A2500-2

Paper
Paperboard
& Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.68 No.10 OCTOBER 1990

PAPER AND PAPERBOARD PRODUCTION: CONTINUES ON TREND

Total paper and paperboard production in September 1990 continued to trend gently higher. The seasonally adjusted rate spiked upward as the seasonal pattern shifted from those observed in 1988 and 1989.

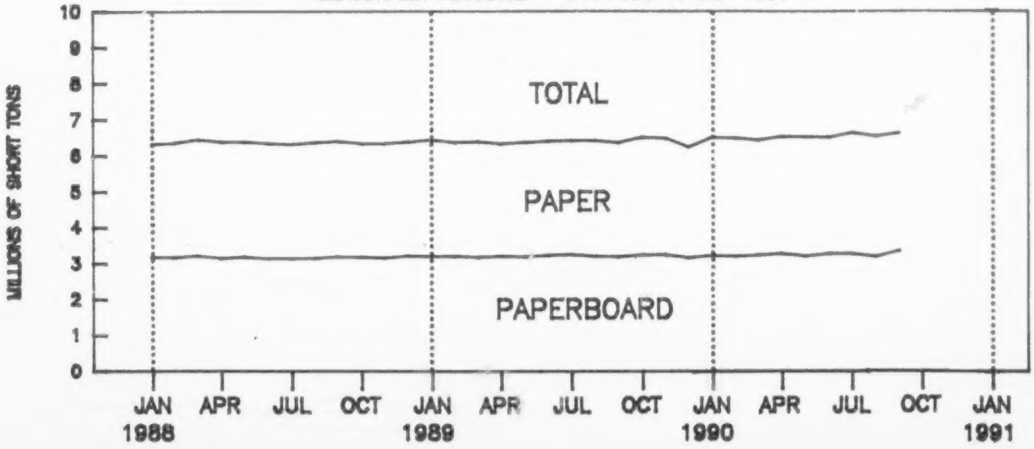
Monthly output totals have been consistently above year-ago levels since the early months of 1990. On a year-to-date basis, the 9-month 1990 average was 78.3 million tons per year, 2.2% above its year-ago rate.

Paper industry trends during the past two years have differed markedly from those evident for the economy as a whole. In 1989, for example, paper production was only fractionally above its year-ago total, while real GNP gained 2.5% and total industrial production gained 2.6%. In the first nine months of 1990 the 2 2% gain in paper and paperboard production compares with 1.2% increases in both real GNP and industrial production.

Paper: The production gains from last year's levels have largely been centered on the paper grades. The January-September rate of paper production was 39.3 million tons per year, 3.3% ahead of its comparable 1989 level. Newsprint and the printing-writing paper grades continue to dominate.

PAPER AND PAPERBOARD PRODUCTION

SEASONALLY ADJUSTED - JAN 1988 TO SEP 1990



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Newsprint production, stimulated by the introduction of four new machines since mid-1989, gained 8.8% from its year-ago rate in the first nine months of 1990. Inventories of newsprint at publishers, which were 4% above their year-ago level as of the end of August 1990, were eqivalent to 41 days of supply, compared to 40 days one year ago and 48 days two years ago.

The 3.5% increase in shipments of printing-writing papers in the first three quarters of 1990 was sparked by a 4.9% rise in **coated** papers and a 3.9% advance in **uncoated free sheet** papers. Trends in unfilled orders in both these grades, however, drifted downward in September, but remained above year-ago levels (see page 3). Imports have been rising, with the coated grades gaining 26% and uncoated free sheet grades, 20.5%, from January-August 1989 to the comparable 1990 period. Coated paper imports now account for 11.6% of the total new supply; uncoated free sheet imports 5.9% of its total new supply.

The uncoated free sheet grades showing the largest gains include **total bond and writing, offset and envelope** papers. Shipments of **form bond** papers, however, are running below year-ago rates, probably reflecting a shift to cut-size papers for computer printouts. As the table on page 3 shows, both coated groundwood and coated free sheet papers enjoyed above-average gains.

Tissue papers and **other packaging and industrial** papers also moved upward, with tissue papers reporting a 2.9% production gain; other papers 3.4%. Domestic shipments of unbleached kraft papers, by contrast, ran 9.4% below year-ago levels in the first nine months of 1990, with the weakness centered on the bag and sack grades. **Total kraft paper** consumption, however, (including the new recycled bags and sacks) estimated from data on net imports and changes in inventories at mills and converters, gained 1.9% in the first nine months of 1990, while unbleached grocers bag and sacks papers increased by 3%.

Paperboard: Total paperboard production, supported by a 14% gain in exports, surpassed its year-ago output by 1.0% in the first nine months of 1990. Gains continue to concentrate in the **containerboard grades**. Production of total containerboard for packaging was up 1.9%; production for domestic use rose 0.7%, compared to a 1.2% increase in shipments of fibre boxes in this same period.

Inventories of containerboard at paperboard mills and plants declined in September, bringing the level to 2.56 million tons. This was equivalent to 4.9 weeks of supply, matching the October 1989 low. Inventories have been fairly stable for the past twelve months, ranging from a high of 2.68 million tons in January 1990 to the October 1989 low of 2.46 million tons.

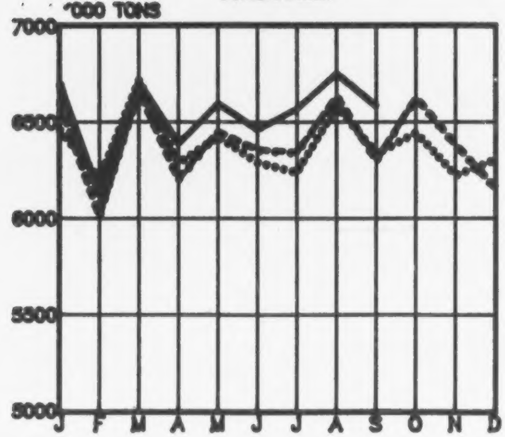
In terms of furnish, **unbleached kraft paperboard** production reported a 2.5% gain, bolstered by a 14.8% gain in production for export. **Semichemical paperboard** production was down a bit, as producers expanded their production of recycled grades of corrugating medium.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		JUNE	JULY	AUGUST (R)	SEPT (P)	Annual Rate Y-T-D	% Change From Same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
PAPER								
Newsprint – Production	5,982	6,088	539	560	572	549	6,548	8.8
– Shipments	5,969	6,079	536	559	571	561	6,574	9.7
Printing & Writing: Total Shipments	21,860	21,607	1,779	1,857	1,973	1,825	22,313	3.5
Groundwood Paper – Shipments	1,624	1,743	142	152	147	137	1,734	–0.2
– New Orders	1,654	1,741	173	156	164	164	1,819	3.2
– Unfilled Orders	208	193	172	175	197	202	202	–4.8
Coated Groundwood – Shipments	4,204	4,059	343	355	375	354	4,167	4.4
Coated Free Sheet – Shipments	3,155	3,157	268	279	303	275	3,325	5.5
Total Coated Papers – Shipments	7,359	7,215	611	634	678	630	7,493	4.9
– New Orders	7,412	7,171	647	639	679	598	7,498	4.4
– Unfilled Orders	751	706	717	721	739	694	694	–12.1
Unctd Free Sheet – Shipments	11,277	11,081	904	947	1,012	928	11,507	3.9
– New Orders	11,298	11,097	986	899	1,019	942	11,682	6.5
– Unfilled Orders	790	748	875	800	830	823	823	25.8
Thin Papers – Shipments	281	245	15	18	19	16	225	–11.3
Cotton Fiber Paper – Shipments	169	161	14	12	14	13	164	0.7
Bleached Bristols – Shipments	1,150	1,163	93	95	104	102	1,190	0.6
Tissue Paper – Production	5,476	5,636	479	482	501	487	5,779	2.9
Total Packaging & Other Paper	5,033	4,916	394	387	402	393	4,694	–3.6
Unbl. Kraft Paper – Shipments	2,800	2,681	208	208	198	198	2,399	–9.4
Other Paper – Production	2,233	2,235	186	179	205	196	2,295	3.4
TOTAL PAPER PRODUCTION – UNADJUSTED	38,352	38,248	3,190	3,285	3,448	3,254	39,334	3.3
TOTAL PAPER PRODUCTION – SEAS ADJ			3,237	3,371	3,341	3,264	39,426	3.4
PAPERBOARD – PRODUCTION								
Containerboard	26,225	26,428	2,251	2,331	2,301	2,272	27,035	1.8
Cont'bd For Dom Use for Fibre Boxes	23,563	23,752	1,997	2,082	2,035	2,071	24,076	0.7
Total Linerboard	16,177	16,399	1,390	1,448	1,425	1,461	16,665	0.7
Unbleached Kraft	15,601	15,833	1,354	1,411	1,376	1,425	16,216	1.6
Solid Bleached	170	178	10	10	12	13	135	–28.6
Recycled	407	388	26	27	37	23	314	–21.6
Corrugating Medium	7,351	7,339	607	633	610	609	7,404	1.0
Semichemical	5,528	5,554	450	477	468	447	5,532	–0.6
Recycled	1,823	1,785	156	156	141	163	1,872	5.8
Container Chip and Filler	35	14	0	1	0	0	8	–48.2
Other Containerboard for Dom Use	320	307	22	27	22	23	288	–8.2
Containerboard for Export	2,342	2,369	231	222	245	179	2,671	13.8
Boxboard	11,878	12,029	1,012	946	1,005	1,004	12,003	–0.8
Boxboard for Packaging for Dom Use	7,014	7,076	586	560	579	596	7,012	–2.2
Folding Boxboard	5,293	5,370	432	415	428	450	5,220	–4.0
Solid Bleached	2,017	1,980	156	151	143	163	1,862	–6.8
Unbleached Kraft	924	987	75	77	76	81	937	–8.2
Recycled	2,353	2,403	201	187	209	207	2,421	0.2
Set–up Boxboard for Dom Use	279	288	25	20	27	24	309	4.5
Milk Carton & Food Service Dom Use	1,442	1,419	129	125	125	122	1,483	3.3
Other Boxboard for Domestic Use	4,075	4,089	346	321	341	334	4,038	–1.7
Boxboard for Export	789	863	80	65	84	74	954	15.2
Paperboard Production by Furnish	38,103	38,456	3,262	3,277	3,306	3,276	39,038	1.0
Unbleached Kraft	19,140	19,490	1,681	1,736	1,722	1,707	20,126	2.5
Semichemical	5,664	5,691	467	489	478	455	5,679	–0.3
Solid Bleached Kraft	4,511	4,521	376	355	362	376	4,457	–1.4
Recycled	8,788	8,754	738	697	744	738	8,776	–0.3
Paperboard Production for Export	3,132	3,232	311	287	329	253	3,624	14.2
Unbleached Kraft	2,296	2,363	229	222	249	178	2,686	14.8
Semichemical	136	138	17	12	9	9	147	7.9
Bleached Kraft	628	693	61	49	65	59	736	10.9
Recycled	72	38	4	4	6	7	55	56.1
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,103	38,456	3,262	3,277	3,306	3,276	39,038	1.0
TOTAL PAPERBOARD PROD – SEAS ADJ			3,258	3,261	3,180	3,357	38,831	1.0
PAPER AND PAPERBOARD – UNADJ	76,455	76,704	6,452	6,562	6,753	6,530	78,372	2.1
PAPER AND PAPERBOARD – SEAS ADJ			6,495	6,632	6,520	6,622	78,257	2.2

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

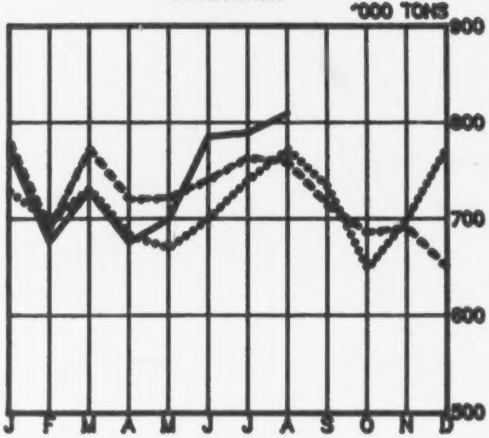
TOTAL PAPER AND PAPERBOARD

PRODUCTION



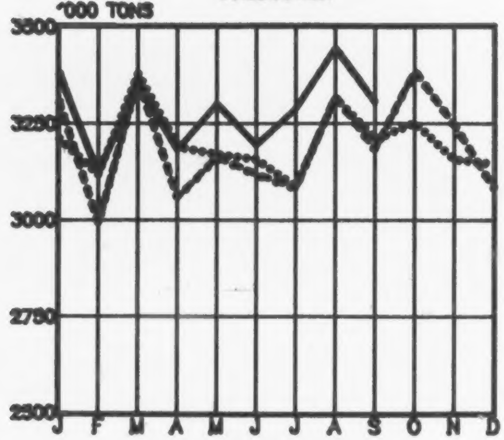
MARKET WOOD PULP

PRODUCTION



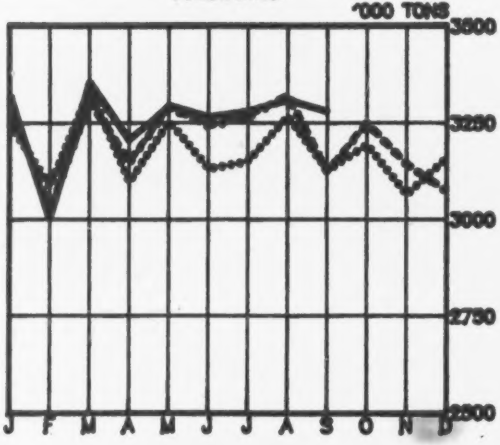
TOTAL PAPER

PRODUCTION



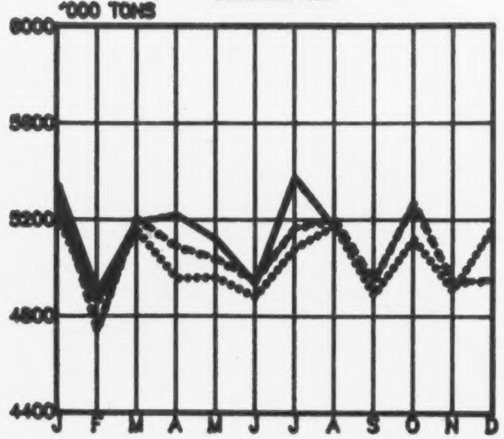
TOTAL PAPERBOARD

PRODUCTION



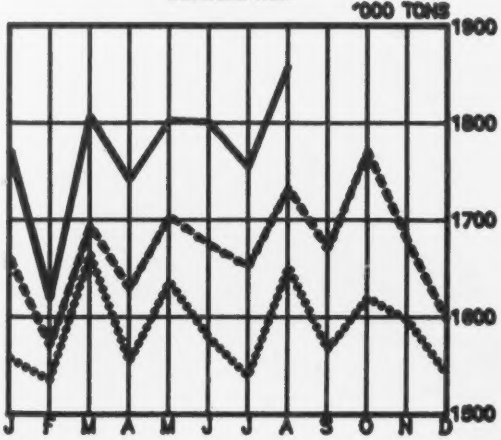
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



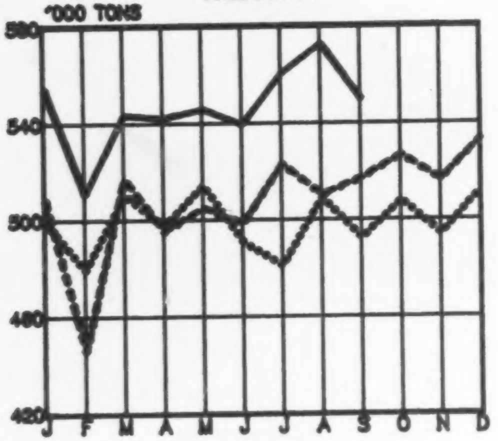
1988 ········ 1989 - - - - - 1990 ———

WOOD PULP STATISTICS (Thousands of Tons)			YEAR 1988	YEAR 1989	MAY 1990	JUNE 1990	JULY (R) 1990	AUG (P) 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,161	61,998	5,156	5,175	5,490	5,343	63,185	1.2
	Imports	A	5,038	5,005	428	364	470	416	5,043	0.4
	Exports		5,528	6,231	443	560	471	554	5,961	-6.5
	New Supply		60,671	60,772	5,141	4,978	5,489	5,206	62,318	2.0
Dissolving Pulp	Production		1,367	1,425	103	114	107	125	1,323	-6.0
	Imports		248	284	27	10	20	8	212	-26.1
	Exports		865	836	64	86	56	66	785	-7.4
	New Supply		751	873	66	38	71	67	750	-11.4
Paper Grades Chemical Pulp	Production		49,493	50,181	4,158	4,202	4,457	4,351	51,195	0.9
	Imports	A	4,419	4,370	368	328	421	373	4,461	1.0
	Exports		4,612	5,325	377	469	412	485	5,126	-5.8
	New Supply		49,300	49,226	4,150	4,060	4,466	4,238	50,530	1.7
Groundwood and Thermo-Mech	Production		5,943	6,029	522	519	555	541	6,363	7.0
	Imports	A	371	351	32	26	29	35	370	15.9
	Exports		51	70	2	5	3	3	49	-42.4
	New Supply		6,263	6,309	552	540	581	573	6,685	8.1
Semi-Chemical	Production		4,358	4,363	373	341	371	327	4,304	-1.6
	Imports									
	Exports									
	New Supply		4,358	4,363	373	341	371	327	4,304	-1.6
MARKET WOOD PULP										
Total Market Wood Pulp	Production		8,565	8,664	698	784	788	808	8,904	0.1
	Imports		3,557	3,539	274	262	284	258	3,282	-7.6
	Exports		5,071	5,309	422	564	451	521	5,505	0.4
	New Supply		7,051	6,893	550	482	620	545	6,681	-4.1
Dissolving Pulp	Production		1,365	1,422	103	113	107	125	1,322	-5.9
	Imports		206	210	25	7	16	5	155	-26.5
	Exports		798	821	60	90	61	57	777	-4.5
	New Supply		774	810	67	31	62	73	700	-12.7
Paper Grades Chemical Pulp	Production		7,200	7,242	595	669	680	682	7,575	1.1
	Imports		3,126	3,072	231	231	245	230	2,879	-6.3
	Exports		4,273	4,489	362	474	390	464	4,728	1.2
	New Supply		6,052	5,825	464	426	534	448	5,726	-2.8
Groundwood Pulp and All Other	Production		0	(0)	0	2	2	2	7	N.M.
	Imports	RS	231	258	18	23	23	23	249	-7.5
	Exports		0	(0)	0	0	(0)	0	0	0.0
	New Supply		231	258	18	24	24	24	256	-4.9

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce.
NOTE: A - API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS - Revised Series.

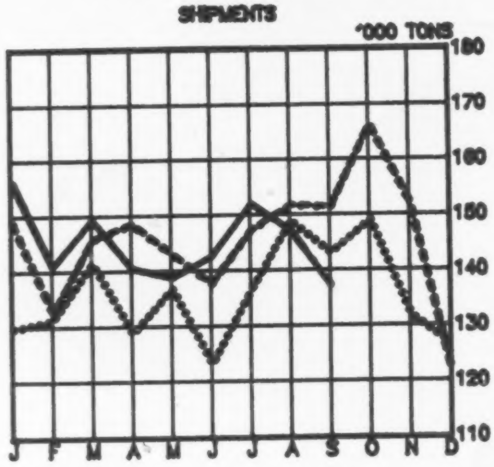
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1988	YEAR 1989	MAY 1990	JUNE 1990	JULY (R) 1990	AUG (P) 1990	Annual Rate 1990	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,737	6,910	6,723	7,118	7,017	82,960	2.5
Total Wood Pulp	60,294	60,727	5,110	4,925	5,366	5,161	61,758	1.3
Waste Paper	19,021	20,010	1,800	1,798	1,752	1,856	21,202	6.3
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	193	184	214	209	215	215	11.4
Producers' Market Inventories	261	342	451	438	526	521	521	47.8
Consumers' Purchased Inventories #	622	519	437	485	432	418	418	-29.3
Waste Paper at Paper & Bd. Mills	1,044	1,085	1,017	1,031	1,043	1,042	1,042	-4.4
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	14	19	22	21	25	26	26	52.9

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API. # Includes all grades of wood pulp N.M. - Not Meaningful
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons



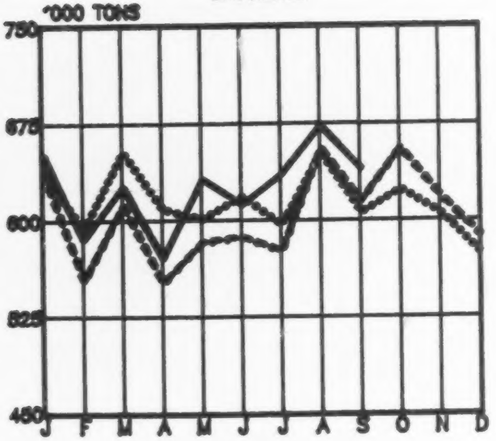
NEWSPRINT

PRODUCTION



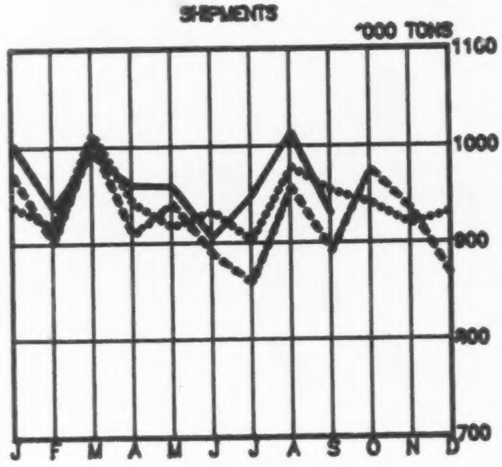
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



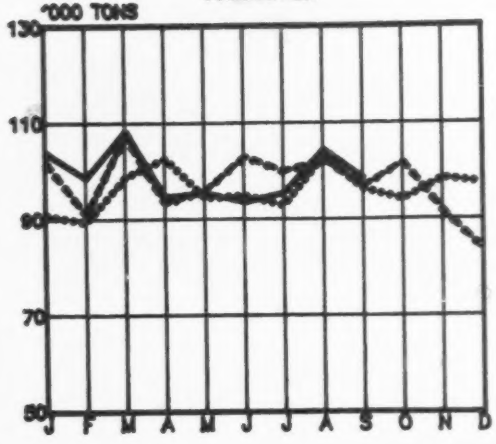
COATED PAPER

SHIPMENTS



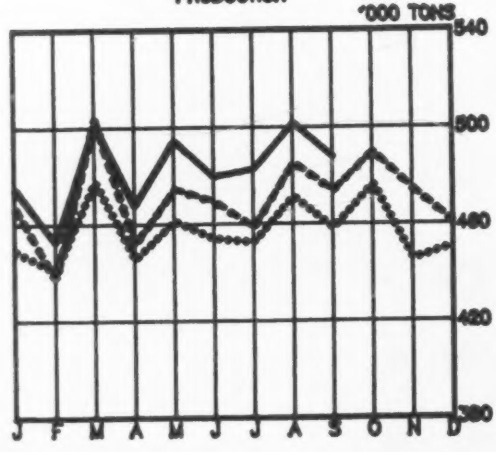
UNCOATED FREE SHEET PAPERS

SHIPMENTS



BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION

1988 ·········· 1989 - - - - - 1990 ———

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR		MAY 1990	JUNE 1990	JULY 1990	AUGUST 1990	ANNUAL RATE Y–T–D 1990	% CHANGE FROM SAME PD LAST YEAR
	1988	1989						
PULPWOOD								
Total U.S. – Total Receipts	96,537	99,279	8,014	8,006	8,396	8,452	99,332	0.5
– Total Consumpt	95,497	98,414	8,113	8,042	8,467	8,333	99,326	0.5
– Residues *	33,186	34,539	2,996	2,888	2,992	2,990	35,715	3.7
– Inventories	4,888	5,462	5,177	5,167	5,106	5,239	5,239	18.7
So. Atlantic – Total Receipts	31,582	31,982	2,652	2,644	2,696	2,651	32,637	2.2
– Total Consumpt	31,567	32,239	2,663	2,663	2,726	2,678	32,493	0.3
– Residues *	9,897	9,961	890	903	956	926	11,118	11.8
– Inventories	1,200	936	1,077	1,082	1,089	1,096	1,096	23.2
Northeast – Total Receipts	7,187	7,242	510	601	628	620	7,218	–0.1
– Total Consumpt	7,216	7,072	536	603	614	590	7,242	0.9
– Residues *	1,664	1,575	120	129	117	132	1,503	–8.2
– Inventories	572	522	413	378	371	382	382	–15.7
South Central – Total Receipts	33,751	36,840	3,012	2,933	3,179	3,276	38,896	4.4
– Total Consumpt	33,646	35,791	2,995	2,908	3,193	3,149	36,496	2.2
– Residues *	9,890	10,539	1,015	931	962	1,002	11,526	11.7
– Inventories	1,160	1,336	1,164	1,192	1,226	1,348	1,348	40.7
North Central – Total Receipts	6,865	7,020	556	602	598	623	7,104	2.0
– Total Consumpt	6,929	6,963	608	579	590	602	7,158	2.0
– Residues *	1,334	1,422	115	105	106	122	1,335	–2.2
– Inventories	839	938	849	877	889	960	960	15.8
West – Total Receipts	16,152	17,196	1,284	1,226	1,294	1,282	15,477	–10.8
– Total Consumpt	16,139	16,349	1,311	1,289	1,344	1,314	15,935	–3.7
– Residues *	10,401	11,042	856	820	851	808	10,232	–8.4
– Inventories	1,117	1,730	1,674	1,638	1,531	1,454	1,454	13.1

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA *						ANNUAL RATE Y–T–D 1990	% CHANGE FROM SAME PD LAST YEAR
		YEAR 1989		JULY 1990		AUGUST 1990			
		Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)		211,061	4,582	0	0	0	0	0	–100.0
Pulpwood chips		792,186	27,339	67,523	2,188	54,646	1,869	707,705	–18.2
Wood Pulp, Total	A	4,353,343	2,599,247	391,545	207,889	363,807	214,769	4,476,680	2.3
Waste Fibrous Materials, Total		164,217	31,659	9,177	1,994	9,778	2,229	139,340	–19.1
Paper, Board & Products, Total	A	10,986,831	6,104,181	937,071	537,879	942,678	544,874	11,417,241	4.5
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	A	10,807,659	5,782,419	926,132	511,350	930,889	514,141	11,287,501	5.0
Paper, Paperboard & Products	A	10,830,545	6,065,465	927,848	535,379	928,757	541,052	11,298,600	4.9
Paper & Paperboard, Only	A	10,651,373	5,743,703	916,910	508,850	916,967	510,320	11,146,859	5.4
Paper, Total	A	10,234,256	5,579,018	877,062	493,049	867,940	490,598	10,642,706	4.9
Newsprint	A	8,330,874	4,278,705	688,789	360,838	671,002	363,438	8,400,163	1.2
Printing, Writing & Rel. Pap.	A	1,579,698	1,069,263	159,988	110,027	164,307	113,158	1,888,529	22.7
Pack. & Ind. Conv. Paper		217,159	119,140	15,263	8,764	20,773	11,324	213,070	0.8
Special Industrial Paper		49,045	60,344	4,617	5,836	4,171	5,714	60,635	38.3
Tissue Paper		57,481	61,567	8,406	7,587	7,688	6,964	80,309	43.5
Paperboard, Total		417,117	164,685	39,848	15,801	49,027	19,721	504,153	19.1
Convtd Paper&Paperbd Products		179,172	321,762	10,939	26,529	11,789	30,732	149,741	–22.5
Wet Machine Board		293	245	57	53	112	93	973	222.6
Construction Paper & Board		155,993	36,472	9,165	2,447	13,809	3,729	119,069	–26.9

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

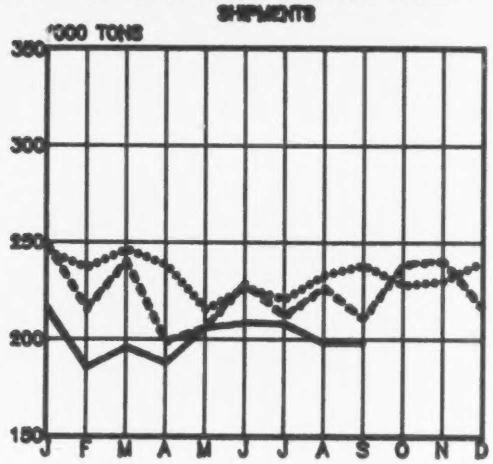
	EXPORTS TO CANADA *							
Pulpwoo:l, Roundwood (in cubic meters)	62,892	1,120	132,013	3,362	130,102	3,244	744,414	1238.1
Pulpwood chips	28,218	1,241	6,871	325	15,114	747	175,160	422.9
Wood Pulp, Total	352,896	141,272	33,192	17,726	26,946	14,155	370,906	8.7
Cotton Pulp & Other Pulp	6,215	4,249	552	504	238	214	4,525	–27.4
Waste Paper	264,379	38,555	63,667	11,276	66,175	11,386	674,759	117.6
Paper, Board & Products, Total	1,083,228	763,613	99,162	106,233	105,696	118,937	1,202,677	15.9
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	72,839	64,945	77,613	72,542	899,277	25.0
Paper, Paperboard & Products	1,062,560	755,810	99,000	106,110	105,480	118,789	1,200,480	18.0
Paper & Paperboard, Only	733,907	489,668	72,677	64,822	77,397	72,396	897,081	28.2
Paper, Total	371,206	340,312	41,623	47,154	44,711	52,521	516,189	45.9
Newsprint	8,316	5,891	1,412	780	1,724	992	18,957	111.4
Printing, Writing & Rel. Pap.	228,021	222,055	30,806	34,743	31,176	36,513	375,025	73.1
Pack. & Ind. Conv. Paper	65,390	29,624	4,317	2,976	4,495	3,106	49,623	–10.4
Special Industrial Paper	62,645	72,956	3,949	7,432	6,015	10,468	59,122	–10.1
Tissue Paper	6,834	9,787	1,140	1,222	1,300	1,442	13,463	91.1
Paperboard, Total	362,701	149,356	31,054	17,668	32,687	19,874	380,891	10.1
Convtd Paper&Paperbd Products	328,653	266,143	26,324	41,288	28,082	46,394	303,399	–4.6
Wet Machine Board	1,628	660	0	0	0	0	0	–100.0
Construction Paper & Board	19,040	7,143	162	123	216	148	2,197	–87.7

SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

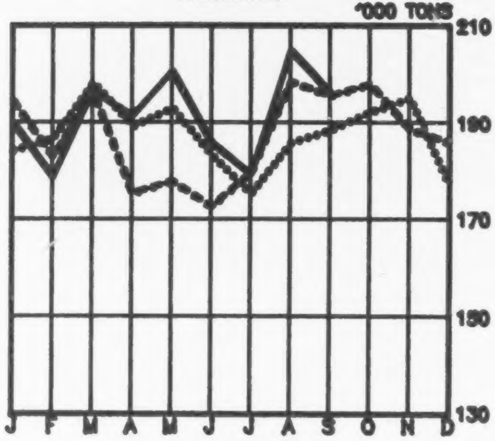
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



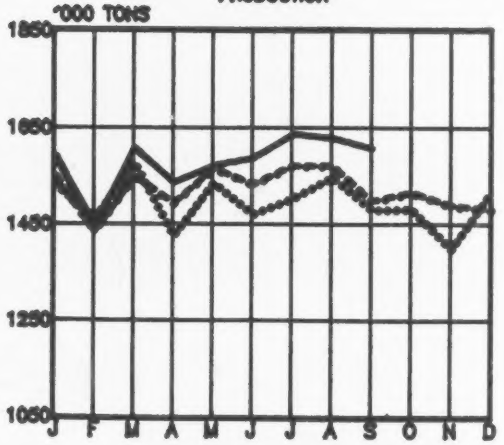
OTHER PAPER

PRODUCTION



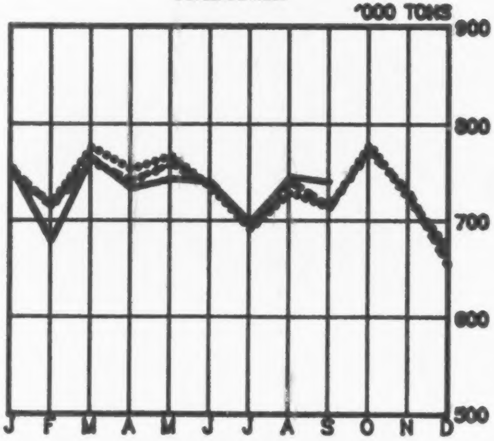
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



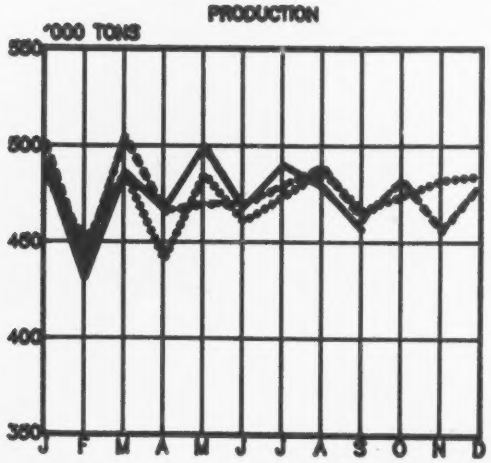
RECYCLED PAPERBOARD

PRODUCTION



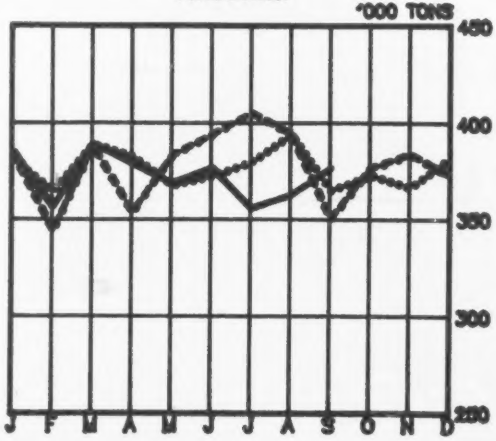
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1988 ········ 1989 -·-·-· 1990 ———

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989 Tons	YEAR 1989 $000	JULY 1990 Tons	JULY 1990 $000	AUGUST 1990 Tons	AUGUST 1990 $000	Annual Rate YTD 1990 Tons (1)	% Change from same Period Last Year
Pulpwood Roundwood (cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood Chips		805,361	27,759	67,545	2,194	55,004	1,888	709,111	-19.8
Total All Imports	A	18,288,860	11,352,263	1,576,660	968,734	1,531,270	961,257	18,540,980	1.4
Wood Pulp Total	A	5,005,100	2,960,642	469,850	252,521	416,322	240,691	5,042,877	0.4
Waste Paper		172,575	33,197	9,129	1,753	9,569	2,156	130,849	-29.5
Other Fibrous Materials		11,254	8,518	1,518	1,016	644	389	14,235	1.1
Paper Board & Products Total	A	13,099,931	8,329,906	1,096,162	713,444	1,104,736	718,020	13,353,018	2.2
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	1,061,915	630,328	1,070,769	633,061	12,981,740	3.8
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,205	8,279,503	1,085,583	710,143	1,089,336	713,190	13,217,948	2.8
Paper & Paperboard Only	A	12,347,748	7,181,244	1,051,336	627,027	1,055,369	628,231	12,798,670	4.4
Paper Total	A	11,814,263	6,900,798	1,003,718	603,344	997,754	600,271	12,194,784	4.2
Newsprint	A	8,553,401	4,379,613	704,546	368,352	684,450	359,333	8,588,147	1.0
Printing & Writing	A	2,732,978	1,906,141	252,744	186,972	263,996	192,459	3,042,120	13.1
Uncoated Groundwood		1,304,114	817,785	105,287	67,831	112,180	72,371	1,305,364	2.0
Coated Print.& Impreg. Pap.	A	774,022	632,484	82,681	66,438	79,274	62,605	952,815	26.0
Uncoated Free Sheet	A	583,077	462,404	56,957	43,565	64,574	48,534	703,847	20.5
Thin (except Cigarette)		12,711	15,200	578	743	1,123	1,166	10,769	-9.1
Bristols		59,052	68,267	7,241	8,398	6,845	7,782	69,525	20.3
Total Pkg & Other Paper		407,087	414,353	34,915	37,595	37,251	37,639	432,251	11.7
Unbleached Kraft Paper		239,303	116,011	19,240	9,507	22,965	11,291	239,246	3.8
Other Pkg. & Indust. Paper		167,785	298,342	15,676	28,088	14,287	26,348	193,006	23.2
Tissue		120,797	110,691	11,512	10,425	12,057	10,839	122,266	4.0
Paperboard, Total		533,486	280,446	47,618	23,683	57,615	27,960	581,885	9.0
Test or Containerboard		85,048	34,401	9,194	3,918	9,042	4,079	125,134	43.4
Semi-Chemical Corrugating		118,176	36,462	6,142	1,715	8,797	2,400	106,195	-17.6
Other Paperboard		330,262	209,584	32,282	18,050	39,776	21,481	370,557	10.2
Convtd Paper&Paperbd Products		562,457	1,098,259	34,248	83,116	33,968	84,960	421,278	-30.6
Paper Products, Total		470,471	924,729	25,658	66,991	25,238	68,247	317,701	-37.7
Paperboard Products, Total		91,986	173,529	8,590	16,125	8,730	16,713	100,677	8.7
Wet machine Board		606	580	72	71	116	95	1,217	110.8
Construction Paper & Board E		189,119	49,824	10,507	3,230	15,283	4,735	133,853	-34.9
Notes									
Other: No Weight Avail. ($000)			136,624		14,413		14,519	133,169	-1.2
Total Imports Incl. Other($000)			11,488,886		983,148		975,776	11,627,645	1.3

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989 Tons	YEAR 1989 $000	JULY 1990 Tons	JULY 1990 $000	AUGUST 1990 Tons	AUGUST 1990 $000	Annual Rate YTD 1990 Tons (1)	% Change from same Period Last Year
Pulpwood, Roundwood (cubic meters)	137,617	3,475	141,079	3,489	137,274	3,441	845,867	483.2
Pulpwood Chips	4,357,811	388,154	368,523	33,598	505,389	42,721	4,558,056	2.5
Total All Exports	18,633,605	8,603,945	1,536,784	713,388	1,721,804	806,318	19,381,536	2.0
Wood Pulp,Total	6,231,172	3,512,604	470,666	240,041	553,825	285,911	5,969,503	-6.5
Cotton Pulp and Other Pulp	122,045	100,510	13,841	9,549	6,985	6,728	134,216	13.1
Waste and Old Paper	5,980,620	729,787	507,648	58,988	557,243	62,001	6,436,362	4.1
Paper, Board & Products,Total	6,299,768	4,261,036	544,630	404,810	603,750	451,678	6,859,438	8.2
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,686	462,100	274,420	511,810	303,334	5,813,971	10.2
Paper, Ppbd & Prod ex Cnst&WMB	6,263,491	4,246,277	544,063	404,379	602,981	451,298	6,841,522	8.7
Paper & Paperboard, Only	5,223,456	2,967,928	461,533	273,989	511,022	302,952	5,805,056	10.8
Paper, Total	1,465,752	1,233,527	107,962	107,303	136,442	131,449	1,482,777	0.3
Newsprint	624,798	357,381	35,438	18,409	47,121	26,922	511,331	-21.4
Printing & Writing	478,201	465,168	48,767	54,980	62,267	64,524	674,148	43.6
Uncoated Groundwood	88,056	64,766	5,079	4,336	5,936	4,963	72,873	-21.2
Clay Coated Paper	168,538	131,418	15,718	16,062	25,957	23,032	224,859	37.8
Uncoated Free Sheet	122,346	166,830	18,558	24,553	19,737	26,272	232,867	112.0
Other Printing & Writing	99,260	102,154	9,411	10,029	10,637	10,258	142,560	37.6
Total Pkg. & Other Paper	342,041	380,790	21,571	31,209	24,886	37,257	276,962	-19.8
Unbleached Kraft	125,818	60,318	8,165	4,454	9,370	5,076	111,077	-6.9
Other Pkg. & Indust. Paper	216,223	320,472	13,406	26,756	15,515	32,182	165,904	-26.7
Tissue	20,712	30,187	2,187	2,704	2,169	2,745	30,316	36.7
Paperboard, Total	3,757,704	1,734,402	353,571	166,686	374,579	171,503	4,312,278	15.0
Solid Wood Pulp	3,572,758	1,646,152	334,861	156,844	358,563	162,656	4,070,136	14.0
Total Linerboard	2,499,716	935,364	244,240	90,894	265,256	95,548	2,993,332	18.6
Bleached Kraft Linerboard	283,113	127,787	17,770	8,980	35,607	15,277	297,282	8.8
Unbleached Kraft Linerbd	2,216,603	807,578	226,470	81,915	229,647	80,270	2,696,050	20.1
Other Unbleached Kraft	246,575	113,315	19,200	11,022	23,011	13,012	288,540	11.6
Other Bleached Kraft	795,305	582,979	64,912	52,707	65,640	52,398	781,104	-1.9
Semi-Chemical Corrugating	31,162	14,494	6,509	2,221	4,658	1,697	47,161	69.1
Recycled Paperboard	184,947	88,250	18,711	9,842	16,018	8,848	242,142	34.1
Convtd Paper&Paperbd Products	1,040,036	1,278,349	82,530	130,390	91,938	148,344	1,026,467	-2.1
Paper Products, Total	473,436	832,806	36,327	86,819	40,298	92,468	427,232	-12.4
Paperboard Products, Total	566,601	445,543	46,203	43,570	51,640	55,876	599,235	6.6
Wet Machine Board	2,889	1,256	0	0	66	32	653	-80.2
Construction Paper & Board E	33,368	13,501	567	431	720	351	8,264	-74.8
Notes								
Other: No Weight Avail. ($000)		23,985		5,975		5,021	46,793	116.3
Total Exports Incl. Other($000)		8,627,611		719,363		811,339	9,230,814	5.4

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		JUNE 1990	JULY 1990	AUGUST 1990	SEPT 1990	Annual Rate Y-T-D 1990	% Change from same Period Last Year
	1988	1989						
Pulp, Paper and Products except Building Grades	124.8	132.4	132.8	132.6	132.4	132.6	133.0	0.7
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	123.8	132.0	132.7	132.6	132.4	132.6	132.8	0.9
Total Wood Pulp	136.7	157.4	152.0	151.1	150.6	150.1	154.6	-1.2
Total Paper	123.2	129.6	128.8	129.1	129.1	129.8	128.4	-1.3
Writing Paper, exc. Newsprint	123.4	130.5	128.9	129.3	129.2	130.3	128.7	-1.8
Newsprint	127.6	122.5	121.0	121.6	121.9	121.8	118.5	-4.2
Total Paperboard	133.2	140.1	135.4	134.9	133.3	133.1	136.4	-2.7
Total Paper and Paperboard *	126.4	132.9	130.9	130.9	130.4	130.8	130.9	-1.7
Converted Products	123.0	131.7	135.0	134.9	135.2	135.2	135.0	3.2
Waste Paper	183.6	157.1	135.9	133.3	129.6	130.0	140.8	-10.9
All Commodities	106.9	112.2	114.2	114.3	116.5	118.3	115.1	2.7
Industrial Commodities	106.3	111.6	113.1	113.2	115.9	118.3	114.2	2.6

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

Paper and Allied Products Companies

Sales and Earnings

	Sales			Net Profit After Taxes			Net Profits/Sales	
	1990	1989	90/89	1990	1989	90/89	1990	1989
	(Thousand Dollars)		%	(Thousand Dollars)		%	%	%
			23	Paper and Allied Products Companies				
First Quarter	16,988,942	15,607,493	8.9	991,228	1,271,363	-22.0	5.83	7.96
Second Quarter	17,219,384	16,670,584	3.3	948,174	1,262,460	-24.9	5.51	7.47
Third Quarter	17,245,812	16,443,085	4.9	776,355	1,297,142	-40.1	4.50	7.89
Fourth Quarter		16,651,576			1,138,810			6.77
Year-to-date	51,454,138	48,721,162	5.6	2,715,757	3,830,965	-28.5	5.28	7.86
Full Year		65,372,738			4,969,775			7.50
			3	Forest Product Companies				
First Quarter	5,416,303	5,235,292	3.5	266,858	341,987	-22.0	4.93	6.53
Second Quarter	6,412,918	5,810,058	10.4	259,256	375,263	-30.9	4.04	6.46
Third Quarter	6,144,408	5,730,507	7.2	206,766	396,336	-47.8	3.37	6.92
Fourth Quarter		5,510,253			81,085 *			1.47
Year-to-date	17,973,629	16,775,857	7.1	732,880	1,113,586	-34.2	4.08	6.64
Full Year		22,286,110			1,194,671			5.34

* Includes net nonrecurring charge at one major company.

Boxboard production continued to run slightly below year-ago levels, with production of packaging boxboard down 2.2%, partly offset by a 15% increase in production for export. **Folding boxboard** output has shifted from the solid bleached grades -- down 6.8% -- to the recycled grades -- up 0.2% -- with unbleached kraft folding boxboard down a solid 8.2% (see table on page 3).

The **milk carton and food service** grades -- all bleached kraft paperboards -- gained 3%, with no support from exports. Production for export of total **bleached kraft paperboard**, however, rose 10.9%, reflecting a 36% increase in solid bleached kraft folding boxboard.

FIBROUS RAW MATERIALS

Consumption of waste paper at paper and paperboard mills, with a January - August gain of 6.3% over its year-ago total, continues to outpace the 1.3% increase in wood pulp consumption (see table on page 5). Total paper grade wood pulp production, however, sparked by a 7% increase in the mechanical pulp grades, rose 1.6%.

Data on chemical paper grade market pulp for September 1990 indicate that production of these grades fell 60,000 short tons below its August level while shipments held relatively steady. This resulted in a 58,000-ton decline in producers inventories, bringing them down to 22 days from supply. This compares to 24 days of supply one month earlier and 19 days one year earlier.

The 19% gain in chemical market pulp shipments from September 1989 to September 1990 brought the 1990 year-to-date total 1% above that of 1989. Shipments to the domestic market continued to lag, falling 3% while shipments to Japan dropped 23%. These losses were offset by a 6% gain in shipments to Western Europe and a 22% increase in shipments to other markets.

SALES AND EARNINGS

Despite a 4.9% increase in revenue, earnings of 23 paper and allied products companies fell 40.1% in the third quarter of 1990 from the year-ago figure.

The January - September returns displayed a less pronounced drop in profits of 28.5%, as industry sales advanced 5.6%. The ratio of net profits to sales in the third quarter and year-to-date 1990 fell to 4.5% and 5.3%, respectively; their comparable 1989 ratios were both 7.9%. The table on the bottom of page 10 presents the data.

CANADIAN PULP AND PAPER CAPACITY GROWTH

Canadian paper and paperboard capacity (excluding wet machine board and the construction grades) will climb from 17.6 million metric tons in 1989 to 20.2 million tons in 1992, according to the Canadian Pulp and Paper Association's latest capacity survey. The 2.6 million-ton increase over three years yields an average annual growth rate of 4.7%, which represents a significant acceleration relative to the 2.0% a year average pace witnessed during the 1980's.

Canadian newsprint capacity is projected to expand from 10.0 millon metric tons in 1989 to 10.9 million tons in 1992, representing an average annual growth rate of 2.9%, as compared with 1% a year from 1979 to 1989. Five new newsprint machines are slated to come on stream during the survey period, although these gains will be partly offset by the retirement, or conversion to other grades, of older machines.

The Canadian paper industry's printing-writing sector is expected to record rapid capacity gains during the next several years. In particular, the survey data suggest that total printing-writing paper capacity will grow from 3.66 million metric tons in 1989 to 4.75 million tons in 1992, yielding an average annual growth rate of 9.1%, versus 8.8% during the decade of the 1980's.

The addition of four new machines will lift Canadian sanitary tissue paper capacity to 666,000 metric tons in 1992 from 507,000 metric tons in 1989. Average annual growth for the period works out to 9.5% a year.

Canada's market pulp capacity is slated to increase from 8.8 million metric tons in 1989 to 10.1 million tons in 1992, an average gain of 4.5% a year. Mechanical grade market pulp capacity will show the fastest growth, averaging 13.7% a year from 1989 to 1992. Mechanical pulp's share of total Canadian market pulp capacity will consequently increase from 12.4% to 15.9% over the survey period. The anticipated gains in mechanical pulp capacity are expected to come from the incremental output of several chemi-thermomechanical pulp (CTMP) machines brought on line during the late 1980's and the completion of three greenfield mills.

Canadian chemical paper grade market pulp capacity is projected at 8.2 million metric tons in 1992, representing an average annual increase of 3.3% a year over the survey period. However, the country's capacity to produce dissolving & special alpha pulps will decline from 281,000 metric tons in 1989 to 250,000 metric tons in 1992.

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 68, NO. 10
OCTOBER, 1990

	PRODUCTION	(000 TONS)				
	(P) SEPT 1990	(R) AUG 1990	SEPT 1989	FIRST 9 MONTHS 1990	 1989	% CHANGE YR TO DATE 1990/1989
	----	----	----	----	----	----------
PAPER GRADES						
Newsprint	549	572	517	4,911	4,514	8.8
Printing & Writing	1,825	1,973	1,785	16,735	16,169	3.5
Uncoated Groundwood (s)	137	147	151	1,301	1,304	-0.2
Coated Groundwood (s)	354	375	338	3,125	2,994	4.4
Coated Free Sheet (s)	275	303	275	2,494	2,364	5.5
Total Coated Paper (s)	630	678	613	5,620	5,357	4.9
Uncoated Free Sheet Paper (s)	928	1,012	890	8,630	8,308	3.9
Thin Paper (s)	16	19	21	169	190	-11.3
Cotton Fiber Paper (s)	13	14	13	123	122	0.7
Bleached Bristols (s)	102	104	96	893	887	0.6
Tissue Paper	487	501	473	4,334	4,214	2.9
Total Pkg & Other Paper	393	402	405	3,521	3,651	-3.6
Unbl. Kraft Paper (s)	198	198	210	1,800	1,986	-9.4
Other Paper	196	205	195	1,721	1,665	3.4
TOTAL PAPER	3,254	3,448	3,179	29,501	28,548	3.3
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,707	1,722	1,596	15,095	14,728	2.5
Unbleached Kraft Linerboard	1,603	1,624	1,494	14,176	13,726	3.3
Other Unbl. Kraft Paperboard	104	98	101	919	1,001	-8.2
Semichemical Paperboard	455	478	461	4,260	4,274	-0.3
Bleached Paperboard	376	362	350	3,342	3,390	-1.4
Recycled Paperboard	738	744	713	6,582	6,603	-0.3
TOTAL PAPERBOARD	3,276	3,306	3,120	29,279	28,995	1.0
TOTAL PAPER AND PAPERBOARD	6,530	6,753	6,299	58,779	57,543	2.1

WOOD PULP (ALL GRADES)	AUGUST 1990	JULY 1990	AUGUST 1989	FIRST 8 MONTHS 1990	 1989	% CHANGE YR TO DATE 1990/1989
	----	----	----	----	----	----------
Dissolving & Special Alpha	125	107	108	882	938	-6.0
Bleached Sulfite)	135	130	136	1,059	1,054	0.5
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,390	2,424	2,362	18,404	18,241	0.9
Unbleached Sulfate	1,826	1,902	1,827	14,668	14,527	1.0
Semichemical	327	371	359	2,869	2,915	-1.6
Groundwood & Thermomechanical	541	555	511	4,242	3,966	7.0
TOTAL PULP DIVISION DATA	5,343	5,490	5,304	42,124	41,640	1.2

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA October 31, 1990	1988	1989	1990	1990 R	1990 P	AN RATE Y-T-D 90	% CH/ SAME PD 89
PAPER AND PAPERBOARD — Tons (000)			JULY	AUGUST	SEPTEMBER		
Total Production (API)...............: excluding :..............................	76,469	76,713	6,562	6,753	6,530	78,372	2.1
Total Seasonally Adjusted..........: construction :..............................			6,632	6,520	6,622	78,257	2.2
Imports (including Products).......: and wet :......E..............................	12,788	12,910	1,084	1,090	1,065	13,195	2.7
Exports (including Products).......: machine :.....E..............................	5,559	6,264	544	560	550	6,757	7.3
Apparent Consumption...............: grades :..............................	83,697	83,359	7,172	7,050	7,157	84,810	2.0
Paper Production % Tonnage Capacity..............................	95.4	92.6	91.2	94.3	92.4	92.9	-
Paperboard Production % Tonnage Capacity..............................	94.5	93.5	91.4	91.2	93.6	93.0	-
PAPER, PAPERBOARD AND PRODUCTS			JUNE	JULY	AUGUST		
Imports.....:Including Construction and :..............................	13,110	13,101	1,121	1,096	1,105	13,353	2.2
Exports.....: WMB Grades (excl. HPB) :..............................	5,691	6,300	575	545	604	6,850	8.2
MARKET WOOD PULP PRODUCTION - Tons (000)..............................	8,565	8,664	784	788	806	8,801	-0.1
TOTAL WOOD PULP PRODUCTION - Tons (000)..............................	61,161 f	61,998 f	5,175	5,490	5,343	63,236	1.2
WOOD PULP IMPORTS - TONS (000)..............................	5,036	5,005	364	470	416	5,043	0.4
WOOD PULP EXPORTS - TONS (000)..............................	5,528	6,231	560	471	554	5,961	-6.5
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS....: excluding :..............................			JUNE	JULY	AUGUST		
Wood Pulp..............................: consumption for :..............................	60,294	60,727	4,925	5,366	5,161	61,758	1.3
Waste Paper..............................: construction & :..............................	19,021	20,010	1,798	1,752	1,856	21,201	6.3
TOTAL..............................: WMB grades :..............................	79,315	80,737	6,723	7,118	7,017	82,958	2.5
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	95,497	98,414	8,042	8,467	8,333	99,326	0.5
EMPLOYMENT (000)			JULY	AUGUST	SEPTEMBER		
Paper and Allied Products.........Total..............................	692.6	697.1 RS	704.6	706.0	701.2	699.0	0.3
Pulp, Paper and Board Mills........Total......A..............................	247.2	246.3 RS	233.6	232.4	229.8	230.0	-6.7
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			JULY	AUGUST	SEPTEMBER		
Paper and Allied Products..............................	11.66	11.96 RS	12.36	12.29	12.39	12.23	2.6
Pulp, Paper Mills......A..............................	14.31	14.72 RS	15.28	15.20	15.47	15.11	3.1
Paperboard Mills.......E..............................	14.49	14.76 RS	15.06	15.17	15.43	15.12	3.1
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1989 Q4	1990 Q1	1990 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	10.92	15.58	17.44	17.56	18.59	17.36	11.4
INDEX OF OUTPUT PER MAN-HOUR (1977=100)			JULY	AUGUST	SEPTEMBER		
:IN PULP, PAPER :...Production Workers..............................	146.0	147.9 RS	150.9	149.4	150.1	150.1	1.3
:AND BOARD MILLS:...All Employees..............................	142.8	144.5 RS	147.6	146.6	146.7	146.7	1.2
PAPER AND ALLIED PRODUCTS (Million $)			JUNE	JULY	AUGUST		
Industry Shipments (Dept. of Commerce)*..............................	127,718	130,501	10,885	11,129	11,088	131,046	0.3
Pulp, Paper and Paperboard*..............................	57,177	57,700	4,704	4,729	4,777	56,084	-4.0
Inventories (End of Period) - Total Industry*..............................	12,065	12,571	12,773	12,842	12,758	12,758	1.5
Pulp, Paper and Paperboard*..............................	4,325	4,980	5,101	5,182	5,206	5,206	8.9
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1989 Q4	1990 Q1	1990 Q2		
Sales (Corporations Only)..............................	107,221	113,573	28,661	28,534	28,844	114,756	1.6
Earnings (Corporations Only)..............................	8,061	7,047	1,160	1,389	1,630	6,038	-24.8
Depreciation (Corporations Only)..............................	4,625	5,010	1,301	1,347	1,341	5,376	9.8
Net Worth (Corporations Only)..............................	42,940	45,642	45,642	48,519	45,597	45,597	1.4
PRICE INDEXES (Bureau of Labor Stats)1982=100			JULY	AUGUST	SEPTEMBER		
Pulp, Paper & Products, ex. Building Grades..............................	124.8	132.4	132.7	132.6	132.4	133.0	0.7
Wood Pulp..............................	136.7	157.4	152.0	151.1	150.6	154.4	-1.3
Waste Paper..............................	183.6	157.1	135.9	133.3	129.6	140.7	-11.0
Paper..............................	123.2	129.6	128.8	129.1	129.1	128.4	-1.3
Paperboard..............................	133.2	140.1	135.4	134.9	133.3	136.3	-2.8
PAPER DEMAND (INDEXED: 1967=100)			JULY	AUGUST	SEPTEMBER		
Total Paper Production *..............................	103.9	103.6	105.3	109.6	108.6	106.9	3.4
Paper New Supply *..............................	103.8	102.3	104.5	107.6	107.0	103.0	1.1
Demand Indicators - (Weighted Average) *..............................	103.8	107.8	110.3	110.4	110.3	110.2	2.5
Production of Nondurable Goods.........*....(21.2%)..............................	103.6	106.4	107.6	108.1	108.1	107.8	1.5
Disposable Income..............................*....(23.9%)..............................	104.4	107.2	108.8	109.1	109.1	108.7	1.9
Total Printing and Publishing..............*....(54.9%)..............................	103.6	108.6	112.0	111.8	111.6	111.8	3.3
PAPERBOARD DEMAND (INDEXED: 1967=100)			JULY	AUGUST	SEPTEMBER		
Total Paperboard Production *..............................	101.7	102.6	104.5	101.9	107.6	103.7	1.0
Production for Domestic Use..............................	102.0	102.7	104.2	98.9	108.8	102.8	-0.1
Demand Indicators - (Weighted Average) *..............................	104.7	107.2	108.6	108.9	109.7	108.1	1.0
Production of Consumer Goods..........*....(62.06%)..............................	104.0	106.6	107.3	107.8	108.1	107.5	1.1
Production of Equipment..............................*....(5.75%)..............................	107.5	112.3	116.9	116.7	117.1	116.4	3.8
Production of Materials..............................*....(32.19%)..............................	105.6	107.4	109.5	109.7	109.4	108.1	0.6
MARKET DATA			JUNE	JULY	AUGUST		
Consumption by Publishers - Tons (000)..............................	13,497	13,493	1,106	1,073	1,085	13,264	1.0
Newspaper Pub. and Printing Empl. Total(000)..............................	475	473	480	479	479	477	1.1
Magazine Advertising Pages (PIB, Inc.)	172,580	180,049	14,050	10,176	11,346	180,453	-4.1
Wholesalers Sales and Inventories (Million $)			JUNE	JULY	AUGUST		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales..............................	46,554	50,740	4,259	4,493	4,917	52,538	5.3
Inventories (End of Period)..............................	3,959	4,137	4,052	4,186	4,207	4,207	2.4
FIBRE BOX DATA (Fibre Box Association)			JULY	AUGUST	SEPTEMBER		
Fibre Box Shipments (Million square feet)..............................	308,507	313,400	26,447	25,087	25,375	314,183	-0.1
Container'bd Inventory at Mill & Plant (000 Tons)..............................	2,553	2,589	2,853	2,580	2,564	2,564	-3.0
RETAIL TRADE (Billion $)							
Total Retail Sales *..............................	1,622	1,711	150.2	148.6	151.2	1,794	5.2
Nondurable Goods Stores Sales *..............................	995	1,062	96.0	96.8	97.7	1,144	8.4
GENERAL ECONOMIC DATA			JULY	AUGUST	SEPTEMBER		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*________	105.4	108.1	110.3	110.4	110.7	109.4	1.2
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)________	106.9	112.2	114.3	116.5	118.3	115.0	2.7
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)________	118.3	124.0	130.4	131.6	132.7	129.6	5.1
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q1	1990 Q2	1990 Q3		
G.N.P. or Expenditure - Current $________	4,874	5,201	5,375	5,452	5,514	5,447	5.3
G.N.P. or Expenditure - 1982 $________	4,017	4,118	4,151	4,163	4,174	4,162	1.2
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	677	667				678	

f - Wood Pulp Prod exc del., explo & scr. R - Revised RS - Revised series E - Last month estimated by API A - Estimated by API Y - Full year estimated by Dep't of Commerce * Seasonally Adjusted

A2500-2

Paper
Paperboard
& Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.68 No.11 NOVEMBER 1990

PAPER AND PAPERBOARD PRODUCTION: STRENGTHENING

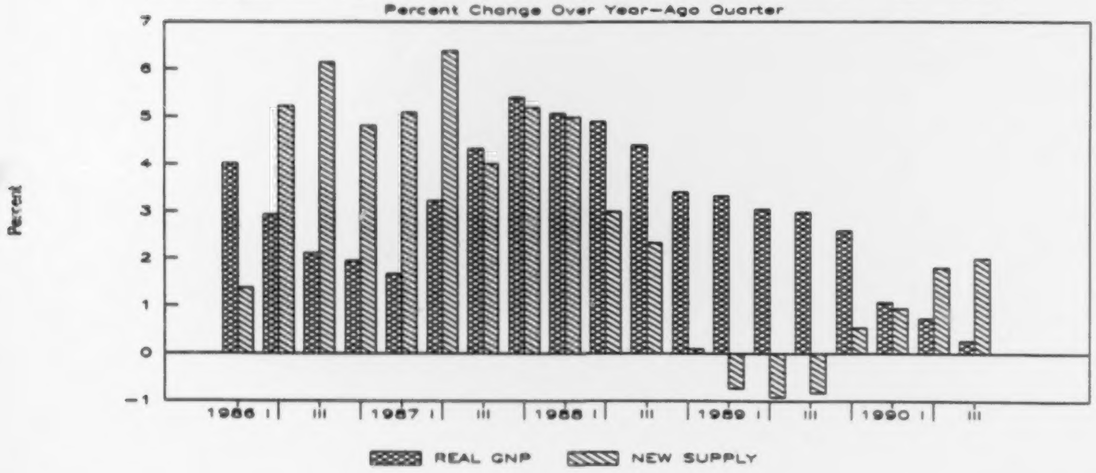
The seasonally adjusted rate of paper and paperboard production in October 1990 moved to a new high, slightly above the July peak. The July-October 1990 production rate was about 1.7% above that of the first half of 1990, bringing the January-October 1990 average to 78.3 million tons per year, 2.1% above its corresponding 1989 level.

This strength, coming at a time of slowdown in the growth of total economic activity, was consistent with the production trends in the major markets for paper and paperboard. The demand indicators in the accompanying Data Sheet show that the index of paper demand was 2.3% above its year-ago rate in the first ten months of 1990, paperboard demand 1.0%.

The chart below shows how total new supply of paper and paperboard (production plus imports less exports) has changed from year-ago levels compared with GNP. Last year real GNP grew faster than paper and paperboard new supply; this year the opposite is true. New supply appears to be moving back to its long-term relationship to real GNP.

PAPER & PAPERBOARD NEW SUPPLY & GNP

Percent Change Over Year-Ago Quarter



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The current stability in paper and paperboard production also reflects, in part, the way the paper industry and users of paper and paperboard products have been managing their inventories. These inventories are at relatively low levels, whether measured in absolute volume or in terms of inventory/sales ratios. As a result, current output flows directly to consumption.

Paper production continues to strengthen. The October 1990 total of 3,468,800 tons marked a new monthly high. After adjustment for seasonal and workday factors, the rate -- 40.1 million tons per year -- was only fractionally below the July 1990 high. Similarly, printing-writing paper shipments moved above 2 million tons in October, marking the first time that level was breached.

Newsprint production, supported by the introduction of four new mills during the past 18 months or so, continues to dominate the grade-by-grade gains. At 6.6 million tons per year, the January-October 1990 output rate was 8.6% ahead of its corresponding 1989 total, with shipments up by more than 9%.

The two million tons of printing-writing papers shipped in October 1990 brought the ten-month 1990 total close to 22.5 million tons per year, 3.5% above its year-ago level. Shipments of uncoated groundwood papers, which had been lagging year-earlier rates, showed a particularly strong gain in October, bringing the year-to-date total back to its 1989 rate.

Coated paper shipments are moving at record-high rates, with the year-to-date total 5% higher than in 1989, with the free sheet grades up 5.3%, the groundwood grades 4.7%.

Gains in uncoated free sheet papers were spread pretty well across the entire spectrum. Shipments of form bond papers, however, are running slightly below their 1989 figures, largely reflecting the growth of personal computers, which utilize cut-size papers rather than the form bond used on the larger computers.

Tissue paper production is moving along a slow and steady growth trend. Its ten-month 1990 total is 2.6% ahead of its 1989 rate, following a 2.9% increase from 1988 to 1989.

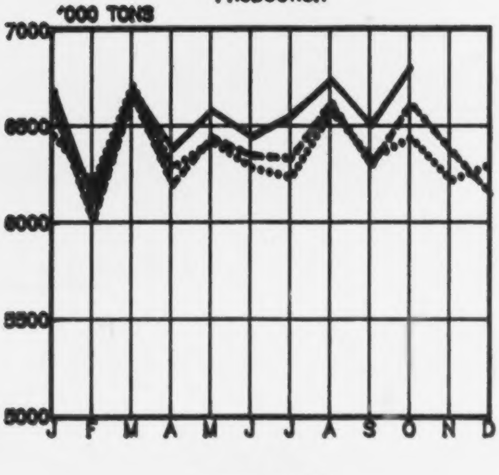
Shipments of unbleached kraft papers were down 9.8% in the January-October 1990 period. Use of these papers, however, virtually matched their year-ago totals. The 1989-1990 decline is shipments from domestic mills amounted to 216,000 tons. This was offset by an estimated 30,000-ton increase in net imports, the introduction of 128,000 tons of bag papers made from recycled fibers and a 55,000-ton swing in inventories at converting plants. A similar calculation for unbleached grocers bags & sacks transformed a 9.8% decline in shipments to a small gain in actual consumption.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		JULY	AUGUST	SEPT (R)	OCT (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
	1988	1989	1990	1990	1990	1990	1990	
PAPER								
Newsprint – Production	5,982	6,088	560	572	549	563	6,569	8.6
– Shipments	5,969	6,079	559	571	561	557	6,585	9.3
Printing & Writing: Total Shipments	21,860	21,607	1,857	1,972	1,826	2,002	22,485	3.5
Groundwood Paper – Shipments	1,624	1,743	152	147	137	168	1,763	0.0
– New Orders	1,654	1,741	156	164	166	163	1,835	4.2
– Unfilled Orders	208	193	175	197	220	203	203	11.2
Coated Groundwood – Shipments	4,204	4,059	355	375	356	387	4,216	4.7
Coated Free Sheet – Shipments	3,155	3,157	279	303	275	302	3,356	5.3
Total Coated Papers – Shipments	7,359	7,215	634	678	631	689	7,572	5.0
– New Orders	7,412	7,171	639	680	603	671	7,570	4.4
– Unfilled Orders	751	706	721	732	689	688	688	-9.8
Unctd Free Sheet – Shipments	11,277	11,081	947	1,011	928	1,010	11,568	3.8
– New Orders	11,298	11,097	899	1,019	943	996	11,710	5.8
– Unfilled Orders	790	748	800	832	826	832	832	29.2
Thin Papers – Shipments	281	245	18	19	16	19	225	-10.4
Cotton Fiber Paper – Shipments	169	161	12	14	13	14	164	0.4
Bleached Bristols – Shipments	1,150	1,163	95	104	101	103	1,192	0.5
Tissue Paper – Production	5,476	5,636	482	501	487	489	5,788	2.6
Total Packaging & Other Paper	5,033	4,916	381	394	384	415	4,649	-5.2
Unbl. Kraft Paper – Shipments	2,800	2,681	208	198	198	208	2,409	-9.8
Other Paper – Production	2,233	2,235	173	197	186	206	2,239	0.2
TOTAL PAPER PRODUCTION – UNADJUSTED	38,352	38,248	3,279	3,439	3,246	3,469	39,490	3.1
TOTAL PAPER PRODUCTION – SEAS ADJ			3,365	3,332	3,256	3,345	39,425	3.1
PAPERBOARD – PRODUCTION								
Containerboard	26,225	26,428	2,331	2,301	2,265	2,342	27,133	2.2
Cont'bd For Dom Use for Fibre Boxes	23,563	23,752	2,082	2,035	2,064	2,126	24,211	1.4
Total Linerboard	16,177	16,399	1,448	1,425	1,454	1,499	16,789	1.6
Unbleached Kraft	15,601	15,833	1,411	1,376	1,419	1,455	16,334	2.5
Solid Bleached	170	178	10	12	12	12	134	-27.5
Recycled	407	388	27	37	23	32	321	-19.8
Corrugating Medium	7,351	7,339	633	610	609	626	7,414	0.9
Semichemical	5,528	5,554	477	468	447	469	5,541	-0.5
Recycled	1,823	1,785	156	141	163	157	1,873	5.4
Container Chip and Filler	35	14	1	0	0	1	8	-46.6
Other Containerboard for Dom Use	320	307	27	22	23	25	290	-7.3
Containerboard for Export	2,342	2,369	222	245	179	191	2,633	11.9
Boxboard	11,878	12,029	946	1,004	993	999	11,988	-1.3
Boxboard for Packaging for Dom Use	7,014	7,076	560	579	585	578	6,992	-2.3
Folding Boxboard	5,293	5,370	415	428	440	448	5,223	-3.9
Solid Bleached	2,017	1,980	151	143	152	142	1,834	-7.9
Unbleached Kraft	924	987	77	76	81	84	945	-7.1
Recycled	2,353	2,403	187	209	207	221	2,444	0.8
Set-up Boxboard for Dom Use	279	288	20	27	24	23	306	3.8
Milk Carton & Food Service Dom Use	1,442	1,419	125	125	121	108	1,463	2.6
Other Boxboard for Domestic Use	4,075	4,089	321	341	334	344	4,046	-2.3
Boxboard for Export	789	863	65	84	74	77	950	12.3
Paperboard Production by Furnish	38,103	33,456	3,277	3,305	3,258	3,341	39,121	1.1
Unbleached Kraft	19,140	19,490	1,736	1,722	1,701	1,754	20,212	3.0
Semichemical	5,664	5,691	489	478	455	480	5,688	-0.3
Solid Bleached Kraft	4,511	4,521	355	362	363	343	4,407	-2.5
Recycled	8,788	8,754	697	743	739	764	8,815	-0.4
Paperboard Production for Export	3,132	3,232	287	329	253	268	3,583	12.0
Unbleached Kraft	2,296	2,363	222	249	178	189	2,644	12.6
Semichemical	136	138	12	9	9	12	147	4.9
Bleached Kraft	628	693	49	65	59	63	738	9.1
Recycled	72	38	4	6	7	4	55	52.7
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,103	38,456	3,277	3,305	3,258	3,341	39,121	1.1
TOTAL PAPERBOARD PROD – SEAS ADJ			3,261	3,179	3,339	3,301	38,887	1.1
PAPER AND PAPERBOARD – UNADJ	76,455	76,704	6,556	6,744	6,504	6,810	78,611	2.1
PAPER AND PAPERBOARD – SEAS ADJ			6,626	6,511	6,595	6,647	78,312	2.1

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

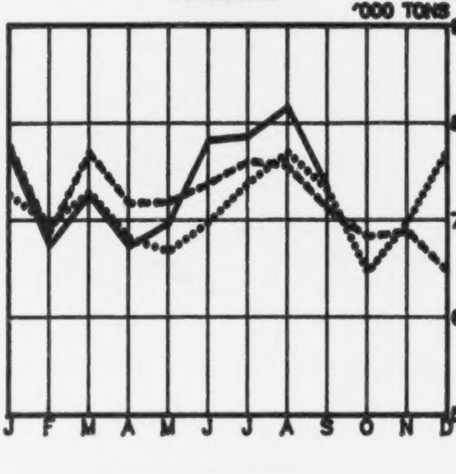
TOTAL PAPER AND PAPERBOARD

PRODUCTION



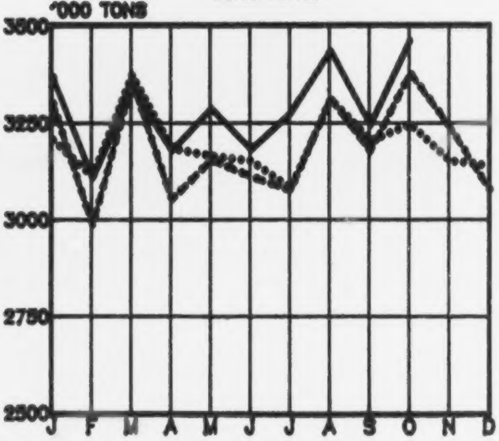
MARKET WOOD PULP

PRODUCTION



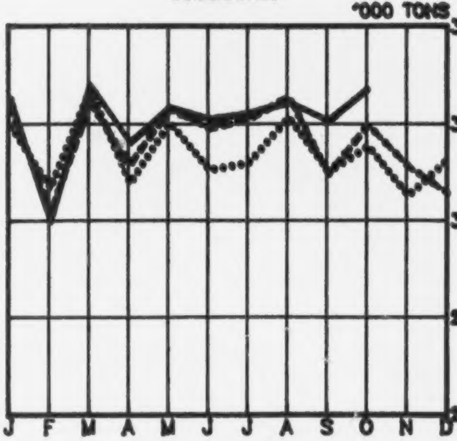
TOTAL PAPER

PRODUCTION



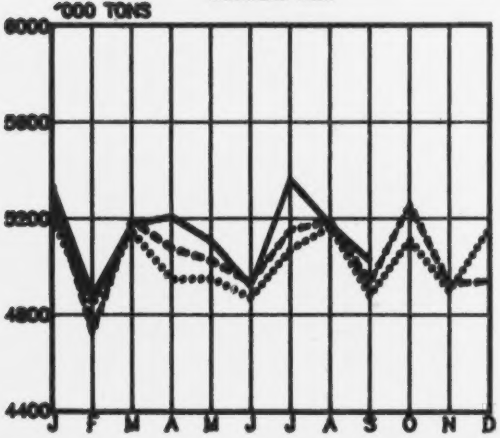
TOTAL PAPERBOARD

PRODUCTION



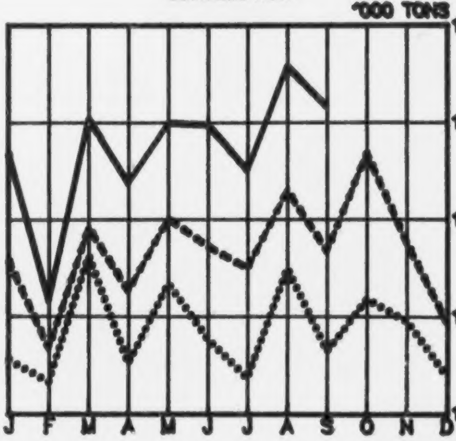
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1988 ········ 1989 - - - - - 1990 ———

WOOD PULP STATISTICS (Thousands of Tons)		YEAR 1988	YEAR 1989	JUNE 1990	JULY 1990	AUG (R) 1990	SEPT (P) 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,161	61,998	5,175	5,490	5,366	5,200	63,129	1.4
	Imports A	5,038	5,005	364	470	416	367	4,972	-1.3
	Exports	5,528	6,231	560	471	554	526	6,000	-6.2
	New Supply	60,671	60,772	4,978	5,489	5,229	5,042	62,147	2.1
Dissolving Pulp	Production	1,367	1,425	114	107	125	126	1,344	-5.5
	Imports	248	284	10	20	8	18	212	-27.3
	Exports	865	836	86	56	66	77	801	-4.1
	New Supply	751	873	38	71	67	66	754	-14.1
Paper Grades Chemical Pulp	Production	49,493	50,181	4,202	4,457	4,374	4,190	51,124	1.2
	Imports A	4,419	4,370	328	421	373	318	4,390	-0.5
	Exports	4,612	5,325	469	412	485	446	5,152	-6.0
	New Supply	49,300	49,226	4,060	4,466	4,261	4,062	50,362	1.9
Groundwood and Thermo-Mech	Production	5,943	6,029	519	555	541	536	6,370	6.9
	Imports A	371	351	26	29	35	31	371	11.9
	Exports	51	70	5	3	3	3	47	-41.1
	New Supply	6,263	6,309	540	581	573	564	6,694	7.7
Semi-Chemical	Production	4,358	4,363	341	371	327	349	4,291	-1.8
	Imports								
	Exports								
	New Supply	4,358	4,363	341	371	327	349	4,291	-1.8
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,565	8,664	784	788	818	735	8,908	0.6
	Imports	3,557	3,539	262	284	258	238	3,235	-9.2
	Exports	5,071	5,309	564	451	521	528	5,598	2.5
	New Supply	7,051	6,893	482	620	555	445	6,545	-6.0
Dissolving Pulp	Production	1,365	1,422	113	107	128	125	1,347	-5.0
	Imports	206	210	7	16	5	7	146	-32.1
	Exports	798	821	90	61	57	80	797	-3.2
	New Supply	774	810	31	62	76	52	696	-14.1
Paper Grades Chemical Pulp	Production	7,200	7,242	669	680	688	608	7,552	1.5
	Imports	3,126	3,072	231	245	230	212	2,842	-7.9
	Exports	4,273	4,489	474	390	464	449	4,801	3.5
	New Supply	6,052	5,825	426	534	454	371	5,593	-5.0
Groundwood Pulp and All Other	Production	0	(0)	2	2	2	2	9	N.M.
	Imports RS	231	258	23	23	23	20	247	-6.3
	Exports	0	(0)	0	(0)	0	0	0	0.0
	New Supply	231	258	24	24	25	21	256	-3.0

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series.

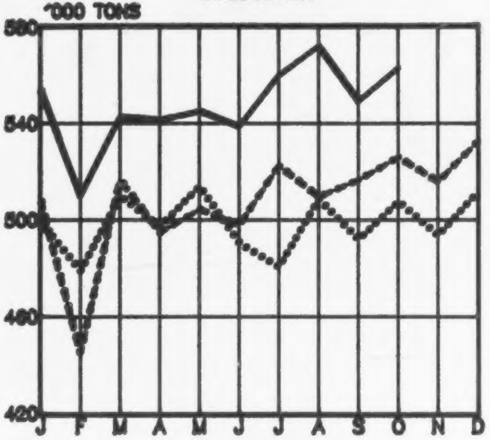
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1988	YEAR 1989	JUNE 1990	JULY 1990	AUG (R) 1990	SEPT (P) 1990	Annual Rate 1990	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,737	6,723	7,118	7,037	6,851	82,904	2.7
Total Wood Pulp	60,294	60,727	4,925	5,366	5,178	5,034	61,631	1.4
Waste Paper	19,021	20,010	1,798	1,752	1,859	1,817	21,273	6.6
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	193	214	209	218	228	228	11.1
Producers' Market Inventories	261	342	438	526	527	461	461	26.5
Consumers' Purchased Inventories #	622	519	485	432	418	423	423	-28.2
Waste Paper at Paper & Bd. Mills	1,044	1,085	1,031	1,044	1,060	975	975	-9.1
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	14	19	21	25	24	22	22	15.8

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API. # Includes all grades of wood pulp N.M. – Not Meaningful

P – Preliminary; R – Revised; (0) – indicates zero to five–hundred short tons

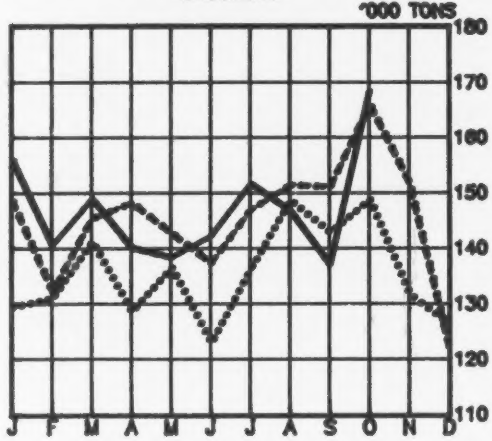
NEWSPRINT

PRODUCTION



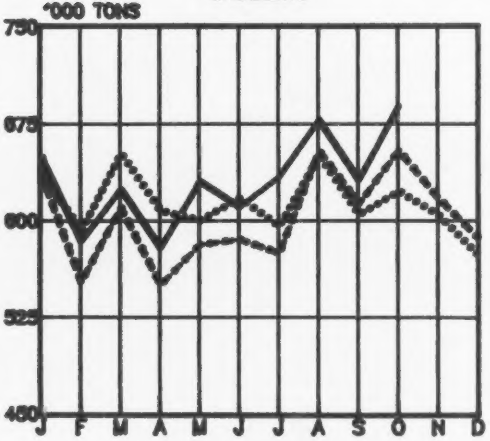
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



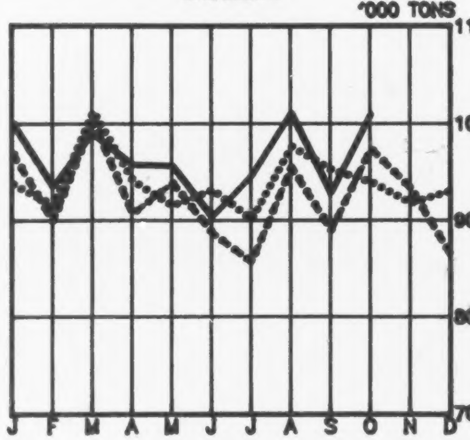
COATED PAPER

SHIPMENTS



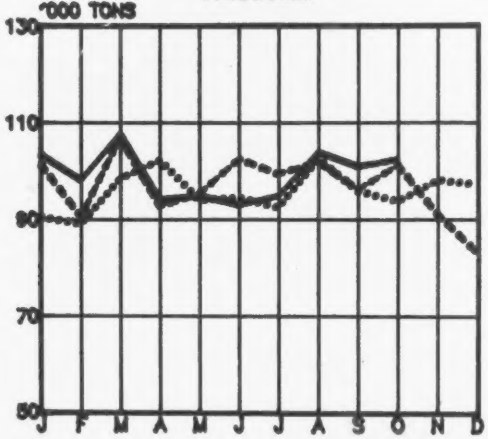
UNCOATED FREE SHEET PAPERS

SHIPMENTS



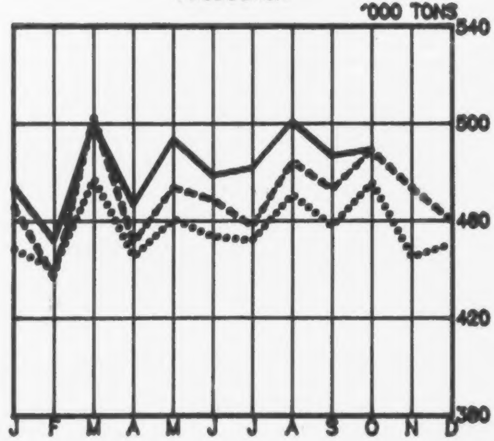
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1988 ········ 1989 ------ 1990 ———

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR		JUNE	JULY	AUGUST	SEPTEMBER	ANNUAL RATE Y-T-D	% CHANGE FROM SAME PD LAST YEAR
	1988	1989	1990	1990	1990	1990	1990	
PULPWOOD								
Total U.S. – Total Receipts	95,537	99,279	8,006	8,395	8,452	8,271	99,323	0.2
– Total Consumpt	95,497	98,414	8,042	8,467	8,333	8,243	99,280	0.5
– Residues *	33,186	34,539	2,888	2,992	2,990	3,037	35,796	4.1
– Inventories	4,888	5,462	5,167	5,106	5,239	5,651	5,651	15.5
So. Atlantic – Total Receipts	31,582	31,982	2,644	2,696	2,651	2,836	32,795	2.1
– Total Consumpt	31,567	32,239	2,663	2,726	2,678	2,828	32,653	0.4
– Residues *	9,897	9,961	903	956	926	1,032	11,259	13.4
– Inventories	1,200	936	1,082	1,089	1,095	1,219	1,219	27.5
Northeast – Total Receipts	7,187	7,242	601	628	620	594	7,208	0.1
– Total Consumpt	7,216	7,072	603	614	590	565	7,191	0.5
– Residues *	1,664	1,575	129	117	132	121	1,497	-7.7
– Inventories	572	522	378	371	382	401	401	-9.7
South Central – Total Receipts	33,751	35,840	2,933	3,179	3,276	3,056	36,869	3.7
– Total Consumpt	33,646	35,791	2,908	3,193	3,149	3,096	36,569	2.2
– Residues *	9,890	10,539	931	962	1,002	938	11,497	11.1
– Inventories	1,160	1,336	1,192	1,226	1,348	1,307	1,307	23.9
North Central – Total Receipts	6,865	7,020	602	596	623	543	7,039	0.6
– Total Consumpt	6,929	6,963	579	590	602	515	7,049	1.5
– Residues *	1,334	1,422	105	106	122	100	1,320	-3.5
– Inventories	839	938	877	889	960	1,012	1,012	12.6
West – Total Receipts	16,152	17,195	1,228	1,294	1,282	1,241	15,412	-10.7
– Total Consumpt	16,139	16,349	1,289	1,344	1,314	1,240	15,817	-3.5
– Residues *	10,401	11,042	820	851	808	846	10,223	-8.2
– Inventories	1,117	1,730	1,638	1,631	1,454	1,712	1,712	11.4

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA *						ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
		YEAR 1989		AUGUST 1990		SEPTEMBER 1990			
		Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood chips		792,186	27,339	54,546	1,869	64,356	2,170	714,879	-17.0
Wood Pulp, Total	A	4,353,343	2,599,247	363,807	214,769	332,080	189,796	4,422,045	1.2
Waste Fibrous Materiale, Total		164,217	31,659	9,778	2,229	9,414	2,310	136,409	-20.2
Paper, Board & Products, Total	A	10,986,831	6,104,181	942,678	544,874	840,441	491,163	11,269,247	3.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	A	10,807,659	5,782,419	930,889	514,141	829,008	461,007	11,120,900	3.8
Paper, Paperboard & Products	A	10,830,545	6,065,465	928,757	541,052	825,496	487,573	11,142,083	3.7
Paper & Paperboard, Only	A	10,651,373	5,743,703	916,967	510,320	814,062	457,417	10,993,736	4.1
Paper, Total	A	10,234,256	5,579,018	867,940	490,596	765,660	438,490	10,481,089	3.4
Newsprint	A	8,330,874	4,278,705	671,002	353,438	578,592	306,399	8,238,267	-0.5
Printing, Writing & Rel. Pap.	A	1,579,698	1,069,263	164,307	113,158	155,665	108,[illegible]22	1,886,246	21.8
Pack. & Ind. Conv. Paper		217,159	119,140	20,773	11,324	20,857	11,779	217,205	2.7
Special Industrial Paper		49,045	60,344	4,171	5,714	3,728	5,708	58,869	31.5
Tissue Paper		57,481	51,567	7,688	6,964	8,838	6,282	80,502	45.2
Paperboard, Total		417,117	164,685	49,027	19,721	48,383	18,927	512,647	22.2
Convtd Paper&Paperbd Products		179,172	321,762	11,769	30,732	11,434	30,156	148,348	-23.2
Wet Machine Board		293	245	112	93	101	93	1,000	265.6
Construction Paper & Board		155,993	36,472	13,809	3,729	14,844	3,497	126,164	-21.8

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

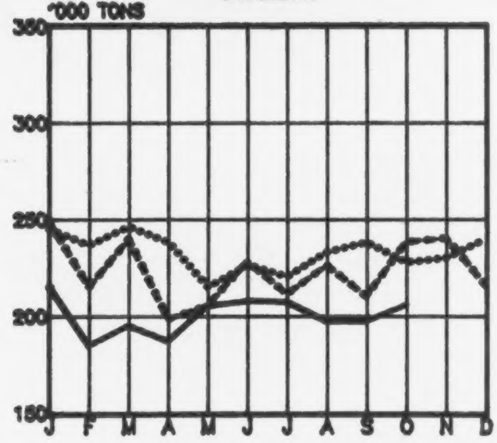
	EXPORTS TO CANADA *							
Pulpwood, Roundwood (in cubic meters)	62,892	1,120	130,102	3,244	156,505	4,088	870,375	994.0
Pulpwood chips	28,218	1,241	15,114	747	27,346	1,139	192,159	480.9
Wood Pulp, Total	352,898	141,272	26,946	14,155	18,187	10,009	353,943	-1.1
Cotton Pulp & Other Pulp	6,215	4,249	238	214	349	310	4,488	-26.4
Waste Paper	284,379	38,555	66,175	11,386	48,573	8,820	664,549	119.2
Paper, Board & Products, Total	1,083,228	783,613	105,698	118,937	96,755	106,421	1,198,053	13.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	77,613	72,542	72,290	66,685	896,745	22.7
Paper, Paperboard & Products	1,062,560	755,810	105,480	118,789	96,518	106,158	1,195,784	15.4
Paper & Paperboard, Only	733,907	489,688	77,397	72,395	72,053	66,423	893,476	28.1
Paper, Total	371,206	340,312	44,711	52,521	43,285	49,091	516,548	44.4
Newsprint	8,316	5,891	1,724	992	1,532	845	18,893	111.9
Printing, Writing & Rel. Pap.	228,021	222,055	31,176	36,513	30,782	34,438	374,399	70.7
Pack. & Ind. Conv. Paper	65,390	29,624	4,495	3,106	4,851	3,266	50,577	-12.2
Special Industrial Paper	62,645	72,956	6,015	10,468	4,860	9,071	59,034	-8.6
Tissue Paper	6,834	9,787	1,300	1,442	1,259	1,471	13,845	87.3
Paperboard, Total	362,701	149,356	32,687	19,874	28,769	17,331	376,928	7.4
Convtd Paper&Paperbd Products	328,653	286,143	28,082	46,394	24,465	39,735	302,308	-7.7
Wet Machine Board	1,628	660	0	0	0	0	0	-100.0
Construction Paper & Board	19,040	7,143	216	148	237	263	2,269	-88.2

SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

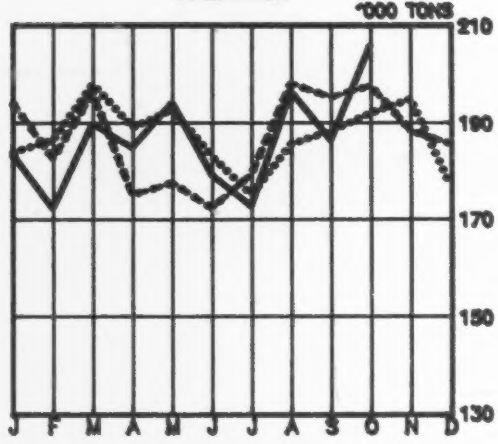
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



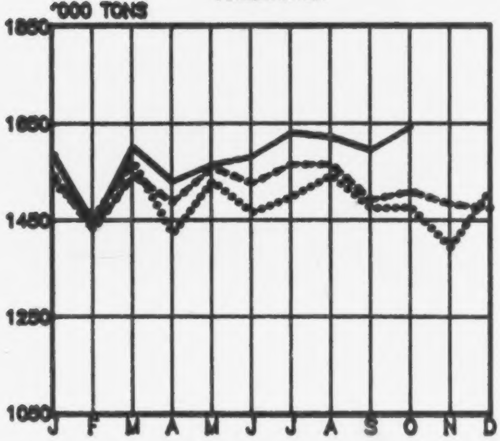
OTHER PAPER

PRODUCTION



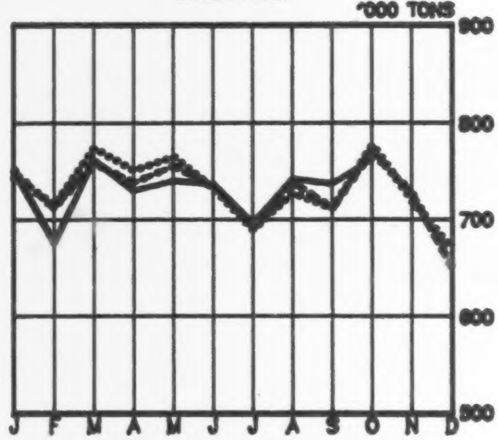
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



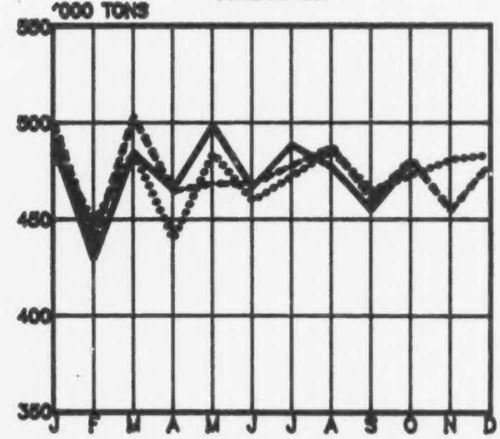
RECYCLED PAPERBOARD

PRODUCTION



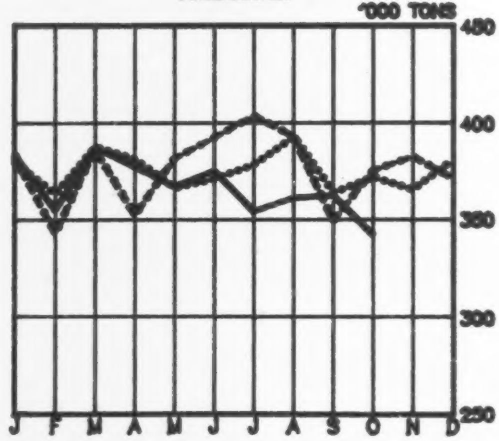
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1988 ········ 1989 -•-•-•-•1990 ———

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989		AUGUST 1990		SEPTEMBER 1990		Annual Rate YTD 1990 Tons (1)	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000		
Pulpwood Roundwood (cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood Chips		805,361	27,759	55,004	1,888	64,394	2,188	716,179	-18.5
Total All Imports	A	18,288,860	11,352,263	1,531,270	961,257	1,381,405	871,256	18,322,743	0.2
Wood Pulp Total	A	5,005,100	2,980,642	416,322	240,691	367,313	209,489	4,972,309	-1.3
Waste Paper		172,575	33,197	9,569	2,156	8,930	2,015	128,217	-29.7
Other Fibrous Materials		11,254	8,518	644	389	808	489	13,730	4.5
Paper Board & Products Total	A	13,099,931	8,329,906	1,104,736	718,020	1,004,354	659,264	13,208,488	1.2
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	1,070,768	633,061	968,664	579,017	12,786,432	2.7
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,205	8,279,503	1,089,336	713,190	987,653	654,514	13,068,157	1.7
Paper & Paperboard Only	A	12,347,748	7,181,244	1,055,369	628,231	951,983	574,268	12,644,102	3.2
Paper Total	A	11,814,263	6,900,798	997,754	600,271	896,984	549,188	12,035,793	2.8
Newsprint	A	8,553,401	4,379,613	684,450	359,333	548,270	310,509	8,427,157	-1.0
Printing & Writing	A	2,732,978	1,998,141	263,996	192,459	262,848	192,121	3,054,571	13.5
Uncoated Groundwood		1,304,114	817,785	112,180	72,371	107,896	69,873	1,304,185	0.4
Coated Print.& Impreg. Pap.	A	774,022	632,484	79,274	62,605	82,822	65,498	957,199	28.2
Uncoated Free Sheet	A	583,077	462,404	64,574	48,534	66,379	50,275	714,148	24.5
Thin (except Cigarette)		12,711	15,200	1,123	1,168	981	1,085	10,853	-10.0
Bristols		59,052	68,267	6,845	7,782	4,790	5,389	68,187	16.7
Total Pkg & Other Paper		407,087	414,353	37,251	37,639	36,509	38,030	432,901	11.3
Unbleached Kraft Paper		239,303	116,011	22,965	11,291	21,114	10,532	240,815	4.3
Other Pkg. & Indust. Paper		167,785	298,342	14,287	26,348	15,395	27,498	192,087	21.4
Tissue		120,797	110,891	12,057	10,839	9,382	8,527	121,164	2.4
Paperboard, Total		533,486	280,446	57,615	27,980	54,975	25,080	608,309	11.7
Test or Containerboard		85,048	34,401	9,042	4,079	9,342	4,217	123,686	45.4
Semi-Chemical Corrugating		118,176	36,462	8,797	2,400	9,753	2,517	107,400	-14.6
Other Paperboard		330,262	209,584	39,776	21,481	35,879	18,346	377,223	13.0
Convtd Paper&Paperbd Products		562,457	1,098,259	33,968	84,960	35,690	80,247	422,056	-28.9
Paper Products, Total		470,471	924,729	25,238	68,247	26,975	64,247	318,368	-36.1
Paperboard Products, Total		91,986	173,529	8,730	16,713	8,714	16,000	103,688	8.1
Wet machine Board		606	580	116	95	131	116	1,258	115.7
Construction Paper & Board E		189,119	49,824	15,283	4,736	16,570	4,634	141,074	-29.8
Notes									
Other: No Weight Avail. ($000)			136,624		14,519		10,411	132,255	-3.5
Total Imports Incl. Other($000)			11,488,886		975,775		881,668	11,511,241	0.4

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989		AUGUST 1990		SEPTEMBER 1990		Annual Rate YTD 1990 Tons (1)	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (cubic meters)	137,617	3,475	137,274	3,441	159,609	4,175	964,693	487.3
Pulpwood Chips	4,357,811	368,154	505,399	42,721	368,205	33,378	4,509,211	2.1
Total All Exports	18,633,605	8,603,945	1,743,734	806,318	1,685,755	768,161	19,506,549	2.8
Wood Pulp,Total	6,231,172	3,512,604	553,825	285,911	525,965	269,480	5,989,511	-6.2
Cotton Pulp and Other Pulp	122,045	100,510	6,985	6,728	15,343	11,301	139,761	17.0
Waste and Old Paper	5,960,620	729,797	579,173	62,001	494,534	56,351	6,411,448	4.7
Paper, Board & Products,Total	6,299,768	4,261,035	603,750	451,678	580,464	429,029	6,863,231	8.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,686	511,810	303,334	497,198	298,496	5,830,906	10.6
Paper, Ppbd & Prod ex Cnst&WMB	6,263,491	4,246,277	602,961	451,296	579,507	428,265	6,854,028	8.8
Paper & Paperboard, Only	5,223,456	2,967,928	511,022	302,952	496,241	297,732	5,821,703	11.1
Paper, Total	1,465,752	1,233,527	136,442	131,449	141,336	131,463	1,515,361	0.7
Newsprint	624,796	357,381	47,121	26,922	59,799	34,263	534,248	-19.3
Printing & Writing	478,201	485,168	62,267	64,524	53,827	57,278	671,012	41.8
Uncoated Groundwood	88,056	64,768	5,936	4,963	7,617	5,498	74,931	-18.4
Clay Coated Paper	168,538	131,418	25,957	23,032	18,207	17,878	224,151	35.0
Uncoated Free Sheet	122,346	186,830	19,737	26,272	17,933	23,372	231,792	104.3
Other Printing & Writing	99,260	102,154	10,637	10,258	10,070	10,530	140,138	37.6
Total Pkg. & Other Paper	342,041	380,790	24,886	37,257	24,526	36,075	278,907	-19.4
Unbleached Kraft	125,818	60,318	9,370	5,075	8,600	5,033	110,202	-12.2
Other Pkg. & Indust. Paper	216,223	320,472	15,515	32,182	15,927	31,042	168,706	-23.5
Tissue	20,712	30,187	2,169	2,745	3,184	3,847	31,193	39.1
Paperboard, Total	3,757,704	1,734,402	374,579	171,503	354,905	166,269	4,306,342	15.3
Solid Wood Pulp	3,572,758	1,646,152	358,563	162,655	340,712	157,729	4,072,182	14.8
Total Linerboard	2,499,716	935,364	265,255	95,548	247,169	89,450	2,990,298	20.1
Bleached Kraft Linerboard	283,113	127,787	35,607	15,277	33,474	14,451	308,883	14.0
Unbleached Kraft Linerbd	2,216,603	807,578	229,647	80,270	213,695	74,999	2,681,415	20.9
Other Unbleached Kraft	246,575	113,315	23,011	13,012	16,628	9,595	260,873	8.0
Other Bleached Kraft	795,305	582,979	65,640	52,398	71,047	58,715	771,265	-1.8
Semi-Chemical Corrugating	31,162	14,494	4,658	1,697	5,869	1,970	49,745	60.2
Recycled Paperboard	184,947	88,250	16,016	8,848	14,192	8,540	234,161	25.6
Convtd Paper&Paperbd Products	1,040,036	1,278,349	91,939	148,344	83,268	130,533	1,032,325	-2.5
Paper Products, Total	473,435	832,806	40,299	92,468	36,879	87,314	428,934	-12.7
Paperboard Products, Total	566,601	445,543	51,640	55,876	46,387	43,219	603,391	6.3
Wet Machine Board	2,889	1,256	68	[illegible]	28	10	617	-82.0
Construction Paper & Board E	33,368	13,501	720	351	930	754	8,585	-74.0
Notes								
Other: No Weight Avail. ($000)		23,665		5,021		3,874	49,428	109.8
Total Exports Incl. Other($000)		8,627,611		811,339		770,034	9,231,880	6.1

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year–To–Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		JULY	AUGUST	SEPT	OCTOBER	Annual Rate Y-T-D	% Change from same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
Pulp, Paper and Products except Building Grades	124.8	132.4	132.6	132.8	132.6	132.9	133.0	0.6
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	123.8	132.0	132.6	132.7	132.6	132.9	132.9	0.8
Total Wood Pulp	136.7	157.4	151.1	152.7	150.1	147.3	154.1	-1.8
Total Paper	123.2	129.6	129.1	128.8	129.8	130.2	128.6	-1.0
Writing Paper, exc. Newsprint	123.4	130.5	129.3	129.2	130.3	130.6	128.9	-1.5
Newsprint	127.6	122.5	121.6	121.9	121.8	122.0	118.9	-3.5
Total Paperboard	133.2	140.1	134.9	135.5	133.1	133.9	136.3	-2.7
Total Paper and Paperboard *	126.4	132.9	130.9	130.9	130.8	131.4	131.0	-1.6
Converted Products	123.0	131.7	134.9	135.1	135.2	135.7	135.0	3.0
Waste Paper	183.6	157.1	133.3	136.3	130.0	130.0	140.4	-11.2
All Commodities	106.9	112.2	114.3	114.3	118.3	120.8	115.4	2.9
Industrial Commodities	106.3	111.6	113.2	113.2	118.3	121.3	114.7	2.9

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

HOURLY COMPENSATION COSTS FOR PRODUCTION WORKERS IN NATIONAL CURRENCY
PAPER AND ALLIED PRODUCTS MANUFACTURING (US SIC 26)

1975 AND 1979-89

COUNTRY OR AREA	1975	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
UNITED STATES	6.52	9.64	10.65	11.77	12.85	13.73	14.32	14.95	15.42	15.76	16.09	16.53
CANADA	7.35	11.27	12.30	14.26	15.90	17.43	18.21	19.18	20.12	20.78	21.61	22.49
BRAZIL	7	41	78	164	341	732	2154	7972				
ISRAEL	1.34	7.60	17.84	42.48	94.36	244.10	1139.49	4.03	6.78	9.03	11.29	12.80
JAPAN	985	1269	1324	1408	1526	1541	1640	1650	1619	1621	1751	1966
KOREA	206	689	731	845	966	1102	1137	1252	1402	1603	1971	2574
SINGAPORE	1.51	2.51	2.97	3.62	4.03	4.70	5.42	5.62	5.52	5.64	6.19	7.42
TAIWAN	17.69	35.72	44.05	51.38	62.41	62.97	72.60	71.38	76.10	81.25	89.91	101.83
AUSTRIA	81.60	112.90	119.78	129.71	137.21	146.37	153.78	162.42	169.13	180.09	194.79	202.89
BELGIUM	238.08	343.73	377.34	416.14	435.56	464.37	505.13	536.42	560.43	580.85	596.85	
DENMARK	37.29	58.93	66.60	73.59	81.14	88.16	92.76	95.68	98.99	110.24	119.78	124.24
FRANCE	21.48	36.12	41.84	47.49	54.78	61.83	66.79	70.79	76.33	79.93	83.11	87.10
GERMANY	13.91	19.19	20.72	21.96	23.17	23.82	24.82	25.60	26.35	28.09	29.35	30.16
GREECE	51	125	159	198	273	343	436	517	572	625	719	
IRELAND	1.40	2.60	3.14	3.90	4.36	4.88	5.41	5.73	6.23	6.45	6.88	7.24
ITALY	3439	6747	7653	8927	10571	12407	13766	15195	15925	17084	18186	19513
NETHERLANDS	18.12	24.53	25.02	25.64	27.01	27.74	29.01	31.52	33.51	34.35	34.89	
PORTUGAL	46.18	104.10	131.40	154.57	184.16	232.77	284.48	378.31	449.79			
SPAIN		378	494	525	626	699	813	897	981	1056	1106	
SWEDEN	31.93	53.87	58.79	65.94	69.82	75.30	85.94	94.30	101.75	110.17	117.82	130.27
SWITZERLAND	14.78	16.94	17.82	19.44	20.81	21.75	22.55	23.48	24.72	25.70	26.36	27.73
UNITED KINGDOM	1.53	2.80	3.34	3.67	4.17	4.48	4.81	5.17	5.55	5.95	6.45	6.84

SEE SEPARATE APPENDIX FOR DEFINITIONS, METHODS, DATA LIMITATIONS, CURRENCY EXCHANGE RATES, AND COUNTRY NOTES.

SOURCE: U.S. BUREAU OF LABOR STATISTICS, SEPTEMBER 1990.

The data on Other Packaging and Industrial Papers, which include bleached kraft and specialty packaging papers plus special industrial papers, have been revised downward by about 55,000 tons (annual rate). The new data indicate that production of these papers are matching their year-ago rates, with a gain in specialty packaging and bleached kraft papers offsetting declines in the special industrial grades.

Paperboard production has also notched upward since mid-1990, with the July-October seasonally adjusted rate 1.5% ahead of its first half 1990 average. The 10-month rate, 38.9 million tons per year, marked a 1.1% gain from the 1989 level.

The gains are concentrated in the containerboard grades. Total linerboard and corrugating medium production, for example, showed a 2.2% increase over 1989, with production for domestic use up 1.4% and production for export 11.9% higher than its year-ago total. The domestic shipments are consistent with the 1.7% increase in shipments of fibre boxes.

Among the boxboard grades, the recycled categories are generally outperforming paperboard made from solid wood pulp. Production of recycled folding boxboard in the first ten months of 1990, for example, increased 0.8%, compared to a 7.9% decline in solid bleached folding boxboard and a 7.1% drop in the unbleached kraft sector. Some recovery in production of unbleached kraft folding boxboard is evident, with the September and October 1990 totals ahead of their year-ago counterparts.

Production of the other bleached kraft paperboard grades, however, is relatively strong: production of milk carton and food service paperboard for domestic use was up 2.6% in the January-October 1990 period, while exports of bleached kraft paperboard gained 9.1%.

FIBROUS RAW MATERIAL

Waste paper continues to gain in importance as a paper-making fiber. In the January-September 1990 period waste paper consumption at paper and paperboard mills expanded by 6.6%, compared to a 1.4% increase in use of wood pulp. At the same time, total production of chemical paper grade wood pulp rose 1.2%; the mechanical pulp grades gained 6.9%, reflecting the increase in newsprint production.

Data for the first ten months of 1990 indicate that exports of chemical paper grade market pulp showed a 4.8% rise, while shipments to the domestic market were down 1.9%. The largest gain in exports was reflected in the 12% increase in shipments to the Asian/African countries. The tonnage gain -- 106,000 tons --was just about matched by the 6.9% increase in shipments to Western Europe. Shipments to the Asian/African countries accounted for 25% of the export total; those to Western Europe, 41%. Exports to Latin America showed a greater percentage gain -- 40% -- but the total accounted for only 9% of these exports.

INTERNATIONAL COMPARISONS OF HOURLY COMPENSATION IN THE PAPER AND ALLIED PRODUCTS INDUSTRY

The Bureau of Labor Statistics recently released its annual compilation of hourly compensation paid to paper and allied products industry production workers in 22 countries. Hourly compensation is defined as all payments made directly to the worker plus employer contributions to legally required insurance programs and private benefit plans. The data, which have been updated to include 1989, are reported both in national currencies and U.S. dollars.

The dollar values were calculated by converting hourly compensation costs in national currencies to U.S. dollars using prevailing exchange rates. The data indicate that several important European countries, including Germany and France, experienced a decline in dollar labor costs in 1989 due to a relative weakening of their currencies vis-à-vis the U.S. dollar. U.S. hourly compensation costs in the paper and allied products industry rose 2.7% in 1989, according to the Bureau of Labor Statistics.

Hourly compensation paid to production workers in the Canadian paper and allied products industry increased 4.1% in terms of Canadian currency but 8.2% in U.S. dollars last year. The larger increase in U.S. currency terms was due to a strengthening of the Canadian dollar.

In 1989, own-currency hourly compensation costs rose 12.3% in Japan, a major market for U.S. paper products, and 10.6% in Sweden, which is a major competitor. However, in terms of dollars, the increases were a more moderate 4.2% and 5.1%, respectively. The following table shows international comparisons of production worker hourly compensation measured in U.S. dollars.

HOURLY COMPENSATION COSTS FOR PRODUCTION WORKERS IN U.S. DOLLARS
PAPER AND ALLIED PRODUCTS MANUFACTURING (US SIC 26)

1975 AND 1979-89

COUNTRY OR AREA	1975	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
UNITED STATES	6.52	9.64	10.65	11.77	12.85	13.73	14.32	14.95	15.42	15.76	16.09	16.53
CANADA	7.22	9.63	10.53	11.89	12.88	14.15	14.06	14.04	14.47	15.67	17.55	18.99
BRAZIL	.88	1.52	1.48	1.76	1.90	1.27	1.17	1.29				
ISRAEL	2.10	2.99	3.48	3.72	3.89	4.34	3.89	3.42	4.56	5.66	7.06	6.68
JAPAN	3.32	5.81	5.87	6.40	6.13	6.48	6.91	6.92	9.62	11.21	13.66	14.24
KOREA	.43	1.42	1.20	1.24	1.32	1.42	1.41	1.44	1.59	1.95	2.69	3.83
SINGAPORE	.64	1.15	1.39	1.72	1.89	2.22	2.54	2.55	2.53	2.68	3.08	3.81
TAIWAN	.47	.99	1.22	1.39	1.60	1.57	1.83	1.79	2.01	2.55	3:14	3.86
AUSTRIA	4.69	8.44	9.26	8.16	8.04	8.15	7.69	7.85	11.08	14.24	15.76	15.32
BELGIUM	6.49	11.72	12.92	11.24	9.51	9.08	8.75	9.04	12.55	15.55	16.23	
DENMARK	6.50	11.20	11.83	10.36	9.72	9.64	8.96	9.03	12.23	16.10	17.77	16.97
FRANCE	5.02	8.49	9.91	8.78	8.33	8.11	7.65	7.88	11.02	13.30	13.95	13.65
GERMANY	5.67	10.47	11.41	9.74	9.54	9.33	8.72	8.70	12.14	15.62	16.71	16.03
GREECE	1.59	3.38	3.72	3.57	4.08	3.90	3.87	3.74	4.09	4.61	5.06	
IRELAND	3.12	5.32	6.46	6.29	6.20	6.09	5.87	6.11	8.36	9.60	10.50	10.27
ITALY	5.27	8.12	8.95	7.89	7.81	8.17	7.84	7.96	10.68	13.17	13.97	14.22
NETHERLANDS	7.18	12.23	12.60	10.31	10.11	9.72	9.04	9.50	13.69	16.95	17.64	
PORTUGAL	1.81	2.13	2.63	2.52	2.30	2.09	1.93	2.20	3.00			
SPAIN		5.63	6.90	5.71	5.68	4.87	5.06	5.28	7.01	8.55	9.49	
SWEDEN	7.71	12.56	13.90	13.10	11.11	9.82	10.39	10.96	14.28	17.36	19.20	20.18
SWITZERLAND	5.73	10.19	10.64	9.92	10.24	10.35	9.59	9.56	13.75	17.23	18.01	16.94
UNITED KINGDOM	3.39	5.95	7.76	7.43	7.30	6.79	6.42	6.71	8.15	9.75	11.48	11.20

SEE SEPARATE APPENDIX FOR DEFINITIONS, METHODS, DATA LIMITATIONS, CURRENCY EXCHANGE RATES, AND COUNTRY NOTES.

SOURCE: U.S. BUREAU OF LABOR STATISTICS, SEPTEMBER 1990.

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 68, NO. 11
NOVEMBER, 1990

PRODUCTION (000 TONS)

	(P) OCT 1990	(R) SEPT 1990	OCT 1989	FIRST 10 MONTHS 1990	 1989	% CHANGE YR TO DATE 1990/1989
PAPER GRADES						
Newsprint	563	549	526	5,474	5,040	8.6
Printing & Writing	2,002	1,826	1,930	18,737	18,098	3.5
Uncoated Groundwood (s)	168	137	166	1,469	1,469	0.0
Coated Groundwood (s)	387	356	362	3,514	3,356	4.7
Coated Free Sheet (s)	302	275	292	2,796	2,656	5.3
Total Coated Paper (s)	689	631	655	6,310	6,012	5.0
Uncoated Free Sheet Paper (s)	1,010	928	975	9,640	9,283	3.8
Thin Paper (s)	19	16	19	188	210	-10.4
Cotton Fiber Paper (s)	14	13	14	137	136	0.4
Bleached Bristols (s)	103	101	101	994	989	0.5
Tissue Paper	489	487	489	4,823	4,703	2.6
Total Pkg & Other Paper	415	384	436	3,874	4,087	-5.2
Unbl. Kraft Paper (s)	208	198	239	2,008	2,225	-9.8
Other Paper	206	186	197	1,866	1,862	0.2
TOTAL PAPER	3,469	3,246	3,380	32,909	31,928	3.1
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,754	1,701	1,619	16,843	16,346	3.0
Unbleached Kraft Linerboard	1,644	1,597	1,512	15,815	15,239	3.8
Other Unbl. Kraft Paperboard	110	104	107	1,029	1,108	-7.1
Semichemical Paperboard	480	455	482	4,740	4,756	-0.3
Bleached Paperboard	343	363	376	3,673	3,766	-2.5
Recycled Paperboard	764	739	771	7,346	7,374	-0.4
TOTAL PAPERBOARD	3,341	3,258	3,248	32,601	32,243	1.1
TOTAL PAPER AND PAPERBOARD	6,810	6,504	6,628	65,510	64,171	2.1

WOOD PULP (ALL GRADES)	SEPT 1990	AUG 1990	SEPT 1989	FIRST 9 MONTHS 1990	 1989	% CHANGE YR TO DATE 1990/1989
Dissolving & Special Alpha	126	125	128	1,008	1,066	-5.5
Bleached Sulfite)	112	139	132	1,175	1,185	-0.9
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,226	2,392	2,166	20,632	20,407	1.1
Unbleached Sulfate	1,852	1,843	1,760	16,537	16,287	1.5
Semichemical	349	327	361	3,218	3,276	-1.8
Groundwood & Thermomechanical	536	541	505	4,778	4,471	6.9
TOTAL PULP DIVISION DATA	5,200	5,366	5,051	47,347	46,691	1.4

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA November 30, 1990	1988	1989	1990	1990 R	1990 P	AN RATE Y-T-D 90	% CH/ SAME PD 89
PAPER AND PAPERBOARD -- Tons (000)			AUGUST	SEPTEMBER	OCTOBER		
Total Production (API)................: excluding :...............................	76,469	76,713	6,744	6,504	6,810	78,612	2.1
Total Seasonally Adjusted..........: construction :...............................			6,511	6,596	6,647	78,312	2.1
Imports (Including Products).......: and wet :......E.......................	12,788	12,910	1,069	988	1,000	12,980	0.0
Exports (Including Products).......: machine :.....E.......................	5,559	6,264	603	580	600	6,889	8.8
Apparent Consumption...............: grades :...............................	83,697	83,359	6,997	7,003	7,047	84,682	1.6
Paper Production % Tonnage Capacity..................................	95.4	92.6	94.1	92.2	94.3	92.9	-
Paperboard Production % Tonnage Capacity..................................	94.5	93.5	91.2	93.1	91.2	82.7	-
PAPER, PAPERBOARD AND PRODUCTS			JULY	AUGUST	SEPTEMBER		
Imports.....:Including Construction and :...............................	13,110	13,101	1,096	1,105	1,004	13,208	1.2
Exports.....: WMB Grades (excl. HPB) :...............................	5,691	6,300	545	604	580	6,863	8.4
MARKET WOOD PULP PRODUCTION - Tons (000)...............................	8,565	8,664	786	818	735	8,908	0.8
TOTAL WOOD PULP PRODUCTION - Tons (000)...............................	61,161 f	61,998 f	5,490	5,366	5,200	63,129	1.4
WOOD PULP IMPORTS - TONS (000)...............................	5,038	5,005	470	416	367	4,972	-1.3
WOOD PULP EXPORTS - TONS (000)...............................	5,528	6,231	471	554	526	5,909	-6.2
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS....: excluding :...............................			JULY	AUGUST	SEPTEMBER		
Wood Pulp...........................: consumption for :...............................	60,294	60,727	5,366	5,178	5,034	61,631	1.4
Waste Paper.........................: construction & :...............................	19,021	20,010	1,752	1,859	1,817	21,273	6.6
TOTAL.............................: WMB grades :...............................	79,315	80,737	7,118	7,037	6,851	82,904	2.7
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	95,497	96,414	8,467	8,333	8,328	96,393	0.6
EMPLOYMENT (000)			AUGUST	SEPTEMBER	OCTOBER		
Paper and Allied Products..........Total...............................	692.6	697.1 RS	705.8	701.0	696.7	696.9	0.3
Pulp, Paper and Board Mills........Total......A...............................	247.2	229.6 RS	232.5	229.1	227.1	229.7	0.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			AUGUST	SEPTEMBER	OCTOBER		
Paper and Allied Products...............................	11.66	11.96 RS	12.29	12.42	12.43	12.26	2.7
Pulp, Paper Mills......A...............................	14.31	14.73 RS	15.18	15.44	15.41	15.14	3.1
Paperboard Mills.......E...............................	14.49	14.76 RS	15.17	15.42	15.61	15.16	3.3
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1989 Q4	1990 Q1	1990 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	10.92	15.58	17.44	17.56	18.59	17.36	11.4
INDEX OF OUTPUT PER MAN-HOUR (1977=100)			AUGUST	SEPTEMBER	OCTOBER		
:IN PULP, PAPER :...Production Workers...............................	146.0	148.0 RS	151.4	149.7	150.3	150.3	1.2
:AND BOARD MILLS:...All Employees...............................	142.8	144.6 RS	147.6	146.5	146.8	146.8	1.1
PAPER AND ALLIED PRODUCTS (Million $)			JULY	AUGUST	SEPTEMBER		
Industry Shipments (Dept. of Commerce)*...............................	127,718	130,501	[illegible]	11,086	11,046	131,211	0.5
Pulp, Paper and Paperboard*...............................	57,177	57,700	4,729	4,794	4,862	56,357	-3.3
Inventories (End of Period) - Total Industry*...............................	12,065	12,571	12,842	12,747	12,756	12,756	1.3
Pulp, Paper and Paperboard*...............................	4,325	4,980	5,182	5,200	5,212	5,212	5.9
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q1	1990 Q2	1990 Q3		
Sales (Corporations Only)...............................	107,221	113,573	28,534	28,844	28,862	114,987	1.6
Earnings (Corporations Only)...............................	8,081	7,047	1,389	1,630	1,246	5,687	-27.6
Depreciation (Corporations Only)...............................	4,625	5,010	1,347	1,341	1,380	5,424	8.7
Net Worth (Corporations Only)...............................	42,940	45,642	48,519	45,597	46,185	46,185	-0.1
PRICE INDEXES (Bureau of Labor Stats)1982=100			AUGUST	SEPTEMBER	OCTOBER		
Pulp, Paper & Products, ex. Building Grades...............................	124.8	132.4	132.6	132.8	132.6	133.0	0.6
Wood Pulp...............................	136.7	157.4	151.1	152.7	150.1	153.9	-1.9
Waste Paper...............................	183.6	157.1	133.3	136.3	130.0	140.3	-11.2
Paper...............................	123.2	129.6	129.1	128.8	129.8	128.5	-1.0
Paperboard...............................	133.2	140.1	134.9	135.5	133.1	136.3	-2.7
PAPER DEMAND (INDEXED: 1987=100)			AUGUST	SEPTEMBER	OCTOBER		
Total Paper Production *...............................	103.9	103.6	108.4	105.9	106.8	106.9	3.1
Paper New Supply *...............................	103.8	102.3	105.6	101.2	103.8	104.7	2.3
Demand Indicators - (Weighted Average) *...............................	103.8	107.8	110.1	109.9	109.7	110.1	2.3
Production of Nondurable Goods.........*....(21.2%)...............................	103.6	106.4	108.1	107.6	107.4	107.7	1.3
Disposable Income.....................*....(23.9%)...............................	104.4	107.2	109.1	109.1	108.8	108.7	1.9
Total Printing and Publishing...............*....(54.9%)...............................	103.6	108.6	111.3	111.1	111.0	111.8	3.0
PAPERBOARD DEMAND (INDEXED: 1987=100)			AUGUST	SEPTEMBER	OCTOBER		
Total Paperboard Production *...............................	101.7	102.6	101.9	107.0	105.8	103.9	1.1
Production for Domestic Use	102.0	102.7	99.9	108.1	106.3	103.1	0.1
Demand Indicators - (Weighted Average) *...............................	104.7	107.2	108.9	109.3	108.1	108.1	1.0
Production of Consumer Goods...........*....(62.06%)...............................	104.0	106.6	107.8	108.4	107.2	107.4	0.9
Production of Equipment...................*....(5.75%)...............................	107.5	112.3	117.1	117.6	113.8	115.3	2.8
Production of Materials.....................*....(32.19%)...............................	105.6	107.4	109.6	109.7	108.8	108.2	0.7
MARKET DATA			JULY	AUGUST	SEPTEMBER		
Consumption by Publishers - Tons (000)...............................	13,497	13,493	1,058	1,098	1,118	13,283	0.6
Newspaper Pub. and Printing Empl. Total(000)...............................	475	473	479	479	479	477	1.2
Magazine Advertising Pages (PIB, Inc.)	172,580	180,049	10,176	11,346	16,409	164,503	-4.1
Wholesalers Sales and Inventories (Million $)			JULY	AUGUST	SEPTEMBER		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales...............................	46,564	50,740	4,493	4,738	4,307	52,204	4.2
Inventories (End of Period)...............................	3,959	4,137	4,166	4,068	4,161	4,161	1.5
FIBRE BOX DATA (Fibre Box Association)			AUGUST	SEPTEMBER	OCTOBER		
Fibre Box Shipments (Million square feet)...............................	306,507	313,400	28,115	25,410	30,526	323,324	1.7
Container'bd Inventory at Mill & Plant (000 Tons)...............................	2,553	2,589	2,620	2,570	2,473	2,473	0.5
RETAIL TRADE (Billion $)							
Total Retail Sales *...............................	1,622	1,711	150.2	152.1	152.3	1,799	5.4
Nondurable Goods Stores Sales *...............................	995	1,062	97.2	98.3	98.1	1,148	8.7
GENERAL ECONOMIC DATA			AUGUST	SEPTEMBER	OCTOBER		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1967 = 100)*...............................	105.4	108.1	110.4	110.5	109.6	109.4	1.3
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)...............................	106.9	112.2	116.5	118.3	120.8	115.6	3.1
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)...............................	118.3	124.0	131.6	132.7	133.5	130.0	5.2
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q1	1990 Q2	1990 Q3		
G.N.P. or Expenditure - Current $...............................	4,874	5,201	5,375	5,443	5,521	5,446	5.3
G.N.P. or Expenditure - 1982 $...............................	4,017	4,118	4,151	4,155	4,173	4,160	1.1
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	677	667				677	

f - Wood Pulp Prod exc del., explo & scr. R - Revised RS - Revised series E - Last month estimated by API A - Estimated by API Y - Full year estimated by Dep't of Commerce * Seasonally Adjusted

A2500-2

Paper
Paperboard
& Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.68 No.12 DECEMBER 1990

PAPER AND PAPERBOARD PRODUCTION: HOLDING UP WELL

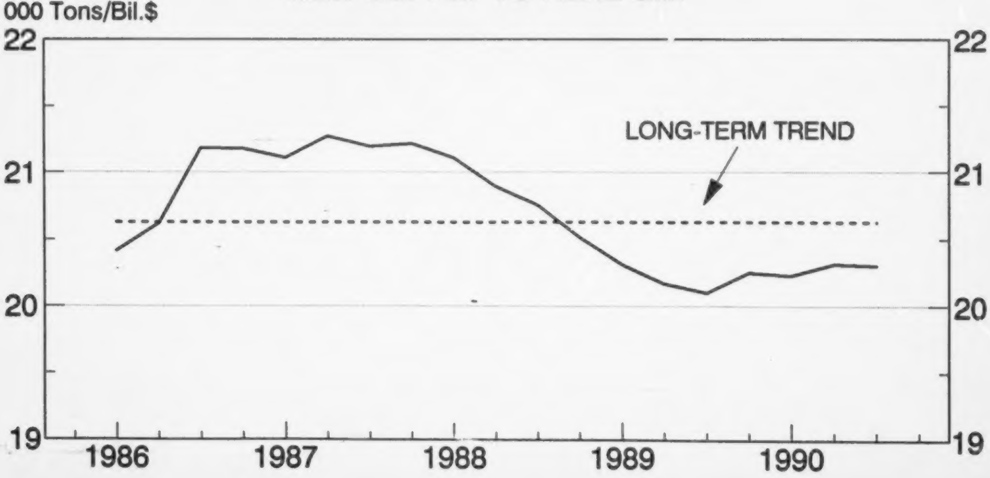
Production of paper and paperboard in November continued along the high-level track it has followed since mid-year, pointing the 1990 total to a 2.1% gain over last year's high.

While the year-to-date rise in paper production -- 2.9% -- was above paperboard's 1.3% increase, paperboard production has shown greater strength during the past five months, with the seasonally-adjusted rate 2% above that of the first six months. Moreover, the November 1990 seasonally-adjusted rate of paperboard production established a new high.

Demand: New supply of paper and paperboard (production plus imports less exports, a proxy for demand) moved up toward its long-term relationship to real GNP during 1990. This can be measured by the ratio of new supply to real GNP. A constant ratio indicates that new supply and real GNP are moving at the same rate. The ratio tends to move up in times of rising GNP and to decrease when real GNP growth flattens or turns negative.

The chart below pictures the quarterly trend of the new supply/real GNP ratio from the first quarter of 1986 through the third quarter of 1990, together with the long-term trend of these ratios.

RATIO OF PAPER AND PAPERBOARD NEW SUPPLY TO REAL GNP



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The graph starts with the tail end of the recovery in paper and paperboard demand from its 1985 low. By the end of 1986, the new supply/real GNP ratio moved above the level of 21,000 tons of demand for each billion dollars of real GNP. The average for the 1976-1989 period was 20,630 tons; the higher level suggested that paper and paperboard new supply was above actual consumption. The trend in the subsequent quarters indicates that new supply was rising at a rate that fairly well matched that of real GNP.

The plateau in paper and paperboard new supply of 1988 and 1989 came at a time of rising real GNP, bringing the ratios to a steady downtrend that bottomed out in the third quarter of 1989. The subsequent increase in new supply was at a slightly faster rate than real GNP, moving the current level of the new supply/real GNP ratio close to its long-term trend.

The pattern of the new supply/real GNP ratio during the past five years suggests that paper and paperboard demand is maintaining its position within the total economy, and that inventory/consumption ratios of paper and paperboard in the hands of users are relatively low. It also suggests that the paper industry is in a particularly strong position to face the weakening trends of total economic activity now becoming evident.

Paper: Newsprint production continues to show the largest gains among the paper grades, reflecting the impact of the new machines that came into operation during the past two years. The rate of domestic newsprint consumption, however, has recently been trending downward, with the ten-month 1990 average fractionally below its corresponding 1989 level. Newsprint consumers , while keeping their stocks relatively low -- the October 1990 level was equivalent to 38 days of supply, matching the 1990 lows of March and April -- did add about 60,000 tons in this period, compared to a 160,000-ton reduction in the first ten months of 1989.

Newsprint shipments from Canada to the United States, as reported by the Canadian Pulp and Paper Association, were some 200,000 tons below their year-ago total in the first ten months of 1990, while shipments from U.S. mills to the U.S. market gained nearly 500,000 tons. The net increase in shipments can be largely explained by the swing in newspaper publishers' inventories, along with similar changes in inventories by other users of newsprint -- commercial printers, for example.

Printing-writing papers and tissue papers reported growth trends close to the total paper average. Unfilled orders for groundwood and uncoated free sheet papers as of the end of November 1990 were relatively high, but those for coated papers were below their year-ago totals.

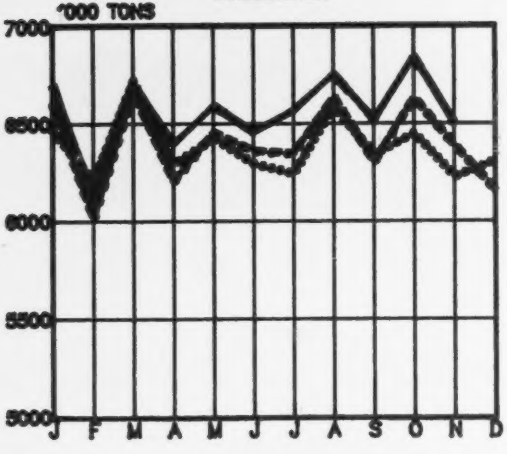
Unbleached kraft paper shipments continued to lag their 1989 rates, falling 11%. Consumption of these papers, including an additional 50,000 tons of shipments from Canada reported by the CPPA over the U.S. Census import total and 140,000 tons of recycled bag papers, was only 2% below its corresponding 1989 level.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		AUGUST	SEPT	OCT (R)	NOV (P)	Annual Rate Y-T-D	% Change From Same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
PAPER								
Newsprint – Production	5,982	6,088	572	549	563	564	6,587	8.7
– Shipments	5,969	6,079	571	561	557	564	6,602	9.0
Printing & Writing: Total Shipments	21,860	21,607	1,972	1,826	2,002	1,823	22,429	3.2
Groundwood Paper – Shipments	1,624	1,743	147	137	168	153	1,770	0.1
– New Orders	1,654	1,741	164	173	163	138	1,827	5.1
– Unfilled Orders	208	193	197	226	222	210	210	28.9
Coated Groundwood – Shipments	4,204	4,059	375	356	387	338	4,201	3.6
Coated Free Sheet – Shipments	3,155	3,157	303	275	302	269	3,344	5.3
Total Coated Papers – Shipments	7,359	7,215	678	631	689	606	7,545	4.3
– New Orders	7,412	7,171	680	603	671	554	7,475	4.0
– Unfilled Orders	751	706	733	688	692	634	634	-12.2
Unctd Free Sheet – Shipments	11,277	11,081	1,011	928	1,010	943	11,544	3.6
– New Orders	11,298	11,097	1,019	937	996	889	11,609	4.5
– Unfilled Orders	790	748	832	820	819	768	768	10.2
Thin Papers – Shipments	281	245	19	16	19	17	223	-9.9
Cotton Fiber Paper – Shipments	169	161	14	13	14	12	163	0.1
Bleached Bristols – Shipments	1,150	1,163	104	101	103	92	1,185	0.6
Tissue Paper – Production	5,476	5,636	501	487	507	465	5,788	2.5
Total Packaging & Other Paper	5,033	4,916	394	384	415	384	4,646	-5.7
Unbl. Kraft Paper – Shipments	2,800	2,681	198	198	208	196	2,404	-10.6
Other Paper – Production	2,233	2,235	197	186	206	188	2,241	0.2
TOTAL PAPER PRODUCTION – UNADJUSTED	38,352	38,248	3,439	3,246	3,486	3,237	39,451	2.8
TOTAL PAPER PRODUCTION – SEAS ADJ			3,332	3,256	3,362	3,251	39,405	2.9
PAPERBOARD – PRODUCTION								
Containerboard	26,225	26,428	2,301	2,265	2,342	2,298	27,172	2.6
Cont'bd For Dom Use for Fibre Boxes	23,563	23,752	2,035	2,064	2,125	2,092	24,292	1.9
Total Linerboard	16,177	16,399	1,425	1,454	1,499	1,467	16,863	2.3
Unbleached Kraft	15,601	15,833	1,376	1,419	1,455	1,419	16,397	3.1
Solid Bleached	170	178	12	12	11	11	133	-27.5
Recycled	407	388	37	23	32	38	333	-15.1
Corrugating Medium	7,351	7,339	610	609	626	625	7,422	1.2
Semichemical	5,528	5,554	468	447	469	469	5,549	0.0
Recycled	1,823	1,785	141	163	157	156	1,873	5.0
Container Chip and Filler	35	14	0	0	1	1	7	-48.5
Other Containerboard for Dom Use	320	307	22	23	25	17	282	-7.8
Containerboard for Export	2,342	2,369	245	179	191	189	2,599	11.2
Boxboard	11,878	12,029	1,004	993	1,003	955	11,943	-1.5
Boxboard for Packaging for Dom Use	7,014	7,076	579	585	581	571	6,982	-2.1
Folding Boxboard	5,293	5,370	428	440	449	440	5,229	-3.6
Solid Bleached	2,017	1,980	143	152	143	139	1,820	-8.7
Unbleached Kraft	924	987	76	81	84	89	956	-4.9
Recycled	2,353	2,403	209	207	221	213	2,453	1.2
Set-up Boxboard for Dom Use	279	288	27	24	23	23	304	3.8
Milk Carton & Food Service Dom Use	1,442	1,419	125	121	109	108	1,449	2.1
Other Boxboard for Domestic Use	4,075	4,089	341	334	345	315	4,022	-2.7
Boxboard for Export	789	863	84	74	77	69	939	9.3
Paperboard Production by Furnish	38,103	38,456	3,305	3,258	3,344	3,253	39,116	1.3
Unbleached Kraft	19,140	19,490	1,722	1,701	1,754	1,716	20,246	3.6
Semichemical	5,664	5,691	478	455	480	477	5,691	0.1
Solid Bleached Kraft	4,511	4,521	362	363	346	336	4,376	-3.3
Recycled	8,788	8,754	743	739	764	724	8,803	-0.4
Paperboard Production for Export	3,132	3,232	329	253	268	258	3,538	10.7
Unbleached Kraft	2,296	2,363	249	178	189	191	2,611	11.9
Semichemical	136	138	9	9	12	8	142	3.4
Bleached Kraft	628	693	65	59	63	56	731	6.2
Recycled	72	38	6	7	4	3	54	41.3
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,103	38,456	3,305	3,258	3,344	3,253	39,115	1.3
TOTAL PAPERBOARD PROD – SEAS ADJ			3,179	3,339	3,304	3,343	39,001	1.3
PAPER AND PAPERBOARD – UNADJ	76,455	76,704	6,744	6,504	6,830	6,489	78,566	2.1
PAPER AND PAPERBOARD – SEAS ADJ			6,511	6,595	6,667	6,594	78,406	2.1

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

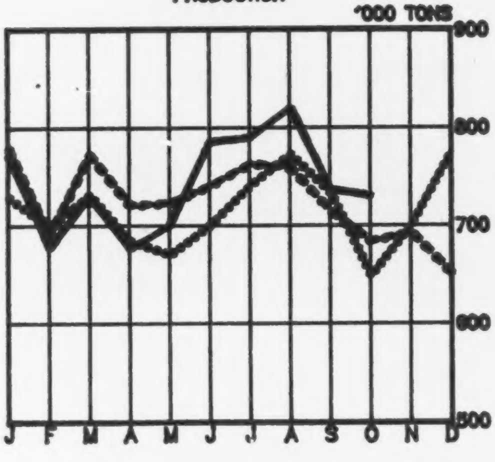
TOTAL PAPER AND PAPERBOARD

PRODUCTION



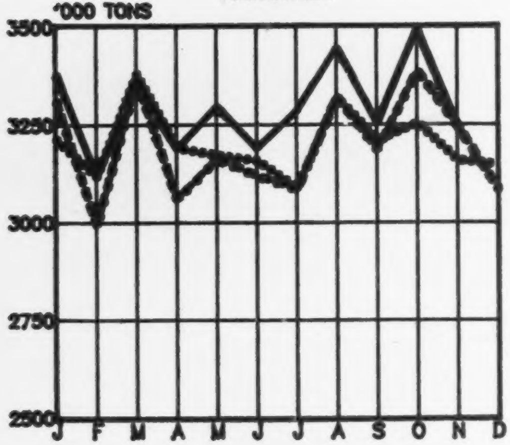
MARKET WOOD PULP

PRODUCTION



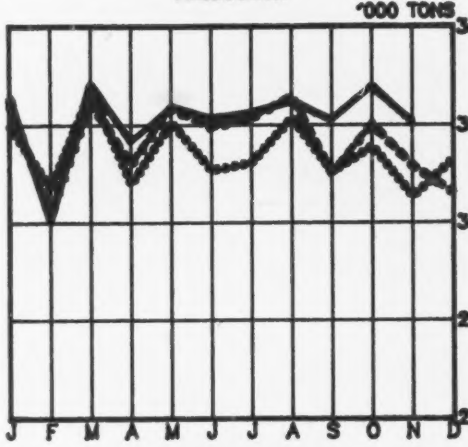
TOTAL PAPER

PRODUCTION



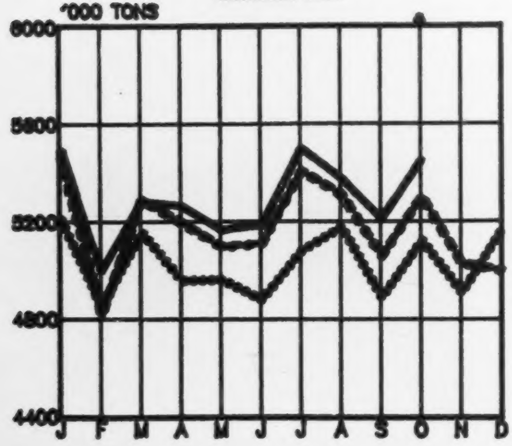
TOTAL PAPERBOARD

PRODUCTION



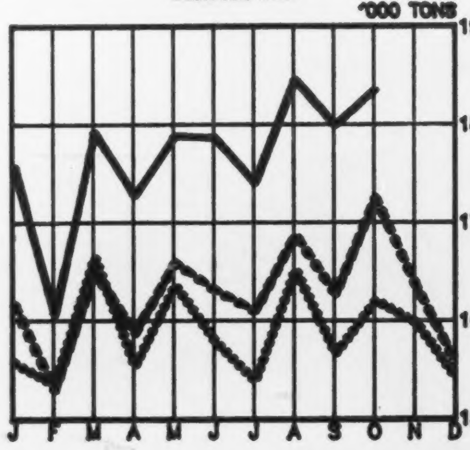
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



WOOD PULP STATISTICS (Thousands of Tons)		YEAR 1988	YEAR 1989	JULY 1990	AUG 1990	SEPT (R) 1990	OCT (P) 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,161	61,998	5,490	5,366	5,200	5,442	63,346	1.5
	Imports A	5,038	5,005	470	416	367	445	5,009	-1.1
	Exports	5,528	6,231	471	554	526	491	5,989	-5.8
	New Supply	60,671	60,772	5,489	5,229	5,042	5,396	62,407	2.2
Dissolving Pulp	Production	1,367	1,425	107	125	126	91	1,319	-6.5
	Imports	248	284	20	8	18	21	215	-28.8
	Exports	865	836	56	66	77	56	788	-5.2
	New Supply	751	873	71	67	66	56	746	-15.4
Paper Grades Chemical Pulp	Production	49,493	50,181	4,457	4,374	4,190	4,411	51,305	1.4
	Imports A	4,419	4,370	421	373	318	392	4,422	-0.1
	Exports	4,612	5,325	412	485	446	433	5,157	-5.4
	New Supply	49,300	49,226	4,466	4,261	4,062	4,370	50,570	2.0
Groundwood and Thermo-Mech	Production	5,943	6,029	555	541	536	578	6,427	7.1
	Imports A	371	351	29	35	31	32	372	11.6
	Exports	51	70	3	3	3	2	44	-40.8
	New Supply	6,263	6,309	581	573	564	609	6,755	7.9
Semi-Chemical	Production	4,358	4,363	371	327	349	361	4,295	-2.1
	Imports								
	Exports								
	New Supply	4,358	4,363	371	327	349	361	4,295	-2.1
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,565	8,664	788	818	734	728	8,890	1.1
	Imports	3,557	3,539	284	258	249	294	3,278	-8.2
	Exports	5,071	5,309	451	521	527	448	5,574	3.4
	New Supply	7,051	6,893	620	555	456	575	6,594	-5.4
Dissolving Pulp	Production	1,365	1,422	107	128	125	91	1,322	-6.1
	Imports	206	210	16	5	18	16	164	-26.3
	Exports	798	821	61	57	80	55	783	-4.1
	New Supply	774	810	62	76	63	53	703	-13.5
Paper Grades Chemical Pulp	Production	7,200	7,242	680	688	607	635	7,558	2.4
	Imports	3,126	3,072	245	230	212	259	2,868	-7.3
	Exports	4,273	4,489	390	464	447	393	4,791	4.8
	New Supply	6,052	5,825	534	454	372	501	5,636	-4.6
Groundwood Pulp and All Other	Production	0	(0)	2	2	2	2	10	N.M.
	Imports RS	231	258	23	23	20	20	246	-3.3
	Exports	0	(0)	(0)	0	0	0	0	0.0
	New Supply	231	258	24	25	21	21	256	1.2

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

NOTE: A – API shifted Import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series.

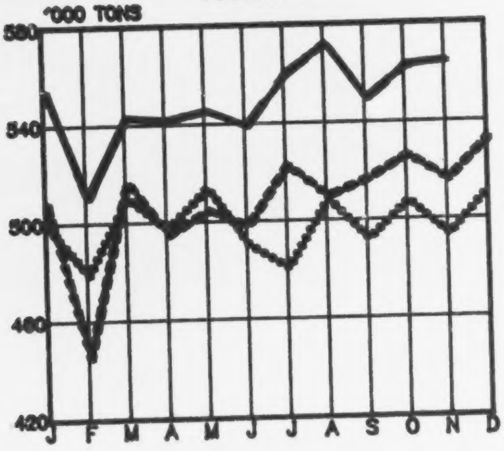
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1988	YEAR 1989	JULY 1990	AUG 1990	SEPT (R) 1990	OCT (P) 1990	Annual Rate 1990	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,217	7,104	7,022	6,831	7,225	83,122	3.2
Total Wood Pulp	60,294	60,727	5,366	5,178	5,034	5,391	61,937	1.5
Waste Paper	19,021	19,490 R	1,738	1,844	1,797	1,834	21,185	8.3
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	193	209	218	228	210	210	12.5
Producers' Market Inventories	261	342	526	527	461	472	472	23.6
Consumers' Purchased Inventories #	622	519	432	418	423	422	422	-23.4
Waste Paper at Paper & Bd. Mills	1,044	1,057	1,035	1,052	965	1,014	1,014	-3.2
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	14	19	26	24	22	23	23	15.0

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API. # Includes all grades of wood pulp N.M. – Not Meaningful

P – Preliminary; R – Revised; (0) – Indicates zero to five-hundred short tons

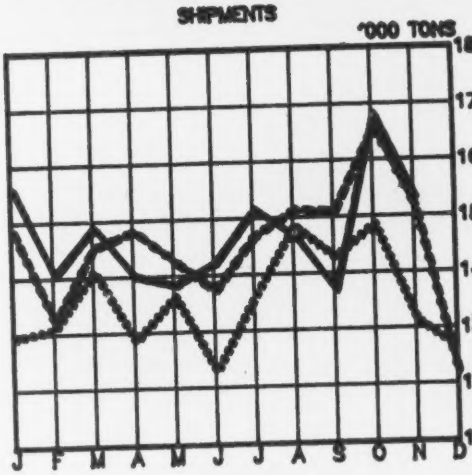
NEWSPRINT

PRODUCTION



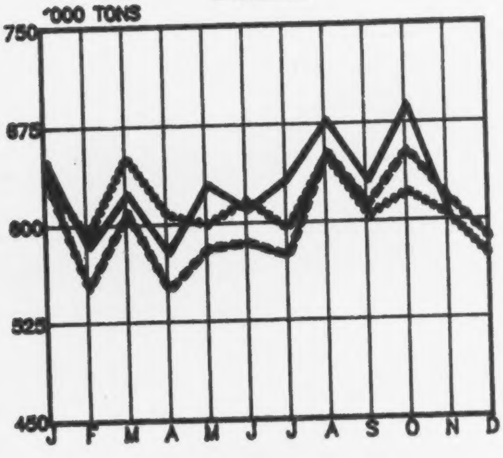
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



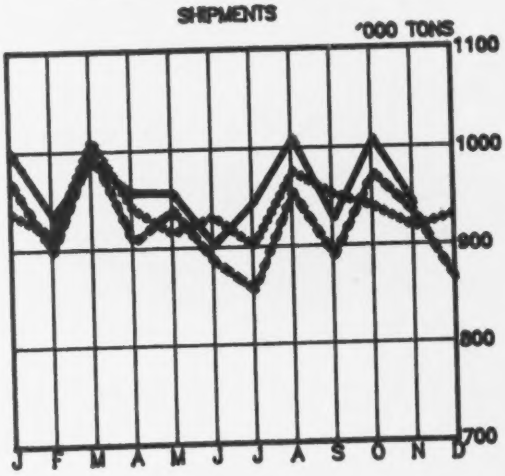
COATED PAPER

SHIPMENTS



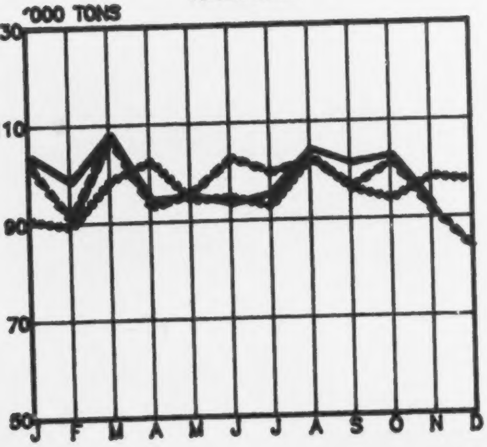
UNCOATED FREE SHEET PAPERS

SHIPMENTS



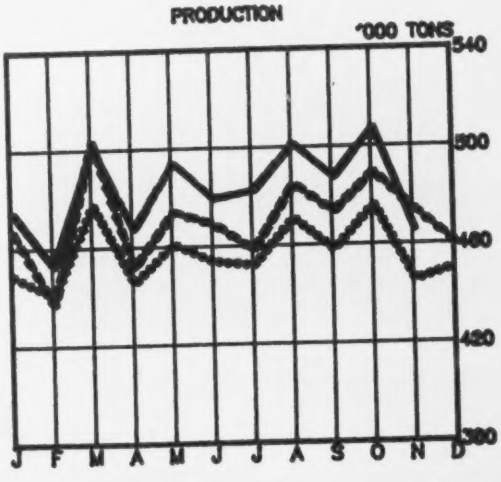
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1988 •••••••• 1989 ▬▬▬▬ 1990 ——

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1988	YEAR 1989	JULY 1990	AUGUST 1990	SEPT 1990	OCTOBER 1990	ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	96,537	99,279	8,395	8,452	8,271	8,712	99,845	0.0
– Total Consumpt	95,497	98,414	8,467	8,333	8,243	8,517	99,572	0.7
– Residues *	33,186	34,539	2,992	2,990	3,037	3,163	36,012	3.8
– Inventories	4,888	5,462	5,106	5,239	5,651	5,751	5,751	6.4
So. Atlantic – Total Receipts	31,582	31,982	2,698	2,651	2,836	2,726	32,798	1.6
– Total Consumpt	31,567	32,239	2,726	2,678	2,828	2,676	32,599	0.2
– Residues *	9,897	9,961	966	926	1,032	923	11,240	12.4
– Inventories	1,200	936	1,089	1,096	1,219	1,216	1,216	27.2
Northeast – Total Receipts	7,187	7,242	628	620	594	662	7,282	–0.3
– Total Consumpt	7,216	7,072	614	590	585	595	7,186	0.3
– Residues *	1,664	1,575	117	132	121	135	1,510	–6.7
– Inventories	572	522	371	382	401	439	439	–12.0
South Central – Total Receipts	33,751	36,840	3,179	3,276	3,066	3,396	37,246	3.6
– Total Consumpt	33,646	35,791	3,193	3,149	3,096	3,242	36,803	2.8
– Residues *	9,890	10,539	962	1,002	938	1,020	11,572	10.2
– Inventories	1,160	1,336	1,226	1,348	1,307	1,474	1,474	5.4
North Central – Total Receipts	6,865	7,020	596	623	543	614	7,072	0.4
– Total Consumpt	6,929	6,963	590	602	515	633	7,104	2.1
– Residues *	1,334	1,422	106	122	100	105	1,314	–5.4
– Inventories	839	938	889	960	1,012	1,011	1,011	7.0
West – Total Receipts	16,152	17,196	1,294	1,282	1,241	1,324	15,460	–10.7
– Total Consumpt	16,139	16,349	1,344	1,314	1,240	1,371	15,881	–3.3
– Residues *	10,401	11,042	851	806	846	980	10,376	–7.4
– Inventories	1,117	1,730	1,531	1,454	1,712	1,611	1,611	0.2

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA	IMPORTS FROM CANADA *						ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
	YEAR 1989		SEPTEMBER 1990		OCTOBER 1990			
	Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)	211,061	4,582	0	0	0	0	0	–100.0
Pulpwood chips	792,186	27,339	64,358	2,170	50,296	1,341	703,746	–15.8
Wood Pulp, Total A	4,353,343	2,599,247	332,080	189,796	350,645	212,617	4,436,615	0.9
Waste Fibrous Materials, Total	164,217	31,659	9,414	2,310	10,368	2,454	136,210	–19.7
Paper, Board & Products, Total A	10,966,831	6,104,181	840,441	491,163	964,601	556,353	11,299,844	2.7
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd. A	10,807,659	5,782,419	829,008	461,007	952,366	526,104	11,151,649	3.1
Paper, Paperboard & Products A	10,830,545	6,065,465	825,496	487,573	949,277	562,607	11,167,007	3.0
Paper & Paperboard, Only A	10,651,373	5,743,703	814,062	457,417	937,042	522,358	11,018,813	3.5
Paper, Total A	10,234,256	5,579,018	765,680	438,490	879,969	499,210	10,488,942	2.5
Newsprint A	8,330,874	4,278,705	578,592	306,399	666,463	350,632	8,216,596	–1.5
Printing, Writing & Rel. Pap. A	1,579,696	1,069,263	155,665	108,322	175,034	120,112	1,907,661	21.7
Pack. & Ind. Conv. Paper	217,159	119,140	20,857	11,779	21,793	12,721	221,636	3.6
Special Industrial Paper	49,045	60,344	3,728	5,708	4,796	6,721	58,736	25.3
Tissue Paper	57,481	51,567	6,838	6,262	9,883	9,024	84,312	51.4
Paperboard, Total	417,117	164,685	48,383	18,927	57,074	23,148	529,870	25.4
Convtd Paper&Paperbd Products	179,172	321,762	11,434	30,156	12,235	30,249	148,194	–22.2
Wet Machine Board	293	245	101	93	26	30	931	272.9
Construction Paper & Board	155,993	38,472	14,844	3,497	15,296	3,717	131,906	–15.6

NOTE: A – API shifted Import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

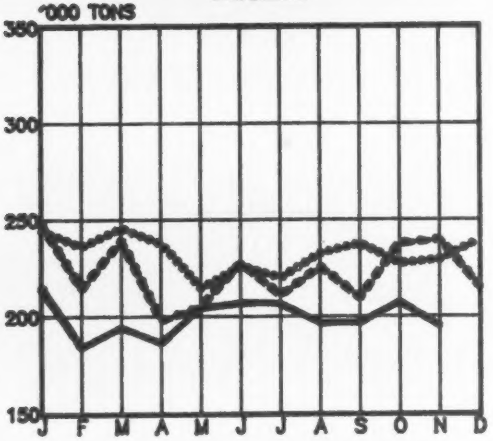
EXPORTS TO CANADA *								
Pulpwood, Roundwood (in cubic meters)	62,892	1,120	156,505	4,088	122,423	3,120	930,245	1152.4
Pulpwood chips	28,218	1,241	27,346	1,139	19,621	861	196,488	515.9
Wood Pulp, Total	352,896	141,272	18,187	10,009	22,465	12,346	345,507	–5.2
Cotton Pulp & Other Pulp	6,215	4,249	349	310	207	209	4,288	–31.1
Waste Paper	284,379	38,555	48,573	8,820	60,720	10,859	670,959	124.2
Paper, Board & Products, Total	1,083,228	763,613	96,755	106,421	114,737	126,803	1,215,932	11.3
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	72,200	66,686	85,937	80,624	909,295	19.9
Paper, Paperboard & Products	1,062,560	755,810	96,518	106,156	114,439	126,583	1,213,533	13.4
Paper & Paperboard, Only	733,907	489,668	72,053	66,423	85,640	80,404	906,896	23.1
Paper, Total	371,206	340,312	43,285	49,091	52,399	59,384	627,772	44.3
Newsprint	8,316	5,891	1,532	845	3,111	1,730	20,737	135.4
Printing, Writing & Rel. Pap.	228,021	222,055	30,782	34,438	37,346	42,361	381,774	70.6
Pack. & Ind. Conv. Paper	65,390	29,624	4,851	3,266	5,158	3,663	51,708	–15.4
Special Industrial Paper	62,645	72,955	4,860	9,071	4,912	9,671	59,025	–8.8
Tissue Paper	6,634	9,787	1,259	1,471	1,873	1,958	14,526	100.0
Paperboard, Total	362,701	149,356	28,769	17,331	33,240	21,020	379,124	2.3
Convtd Paper&Paperbd Products	328,653	286,143	24,465	39,735	28,799	48,179	308,637	–8.2
Wet Machine Board	1,628	660	0	0	0	0	0	–100.0
Construction Paper & Board	19,040	7,143	237	263	296	220	2,399	–88.0

SOURCE: Bureau of Census, Department of Commerce.

E – Estimate of tonnage based on square foot data

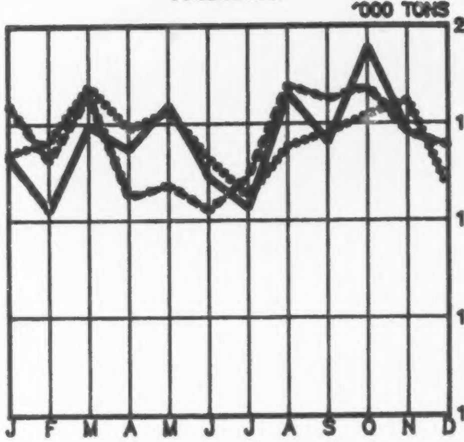
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



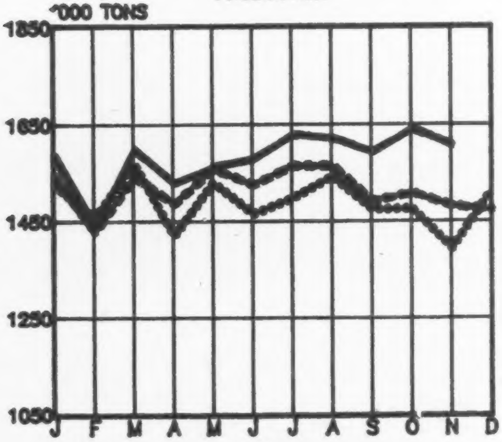
OTHER PAPER

PRODUCTION



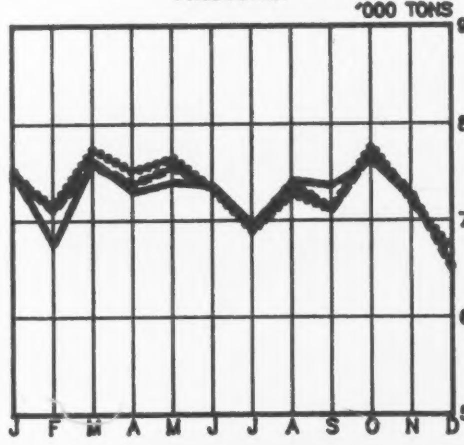
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



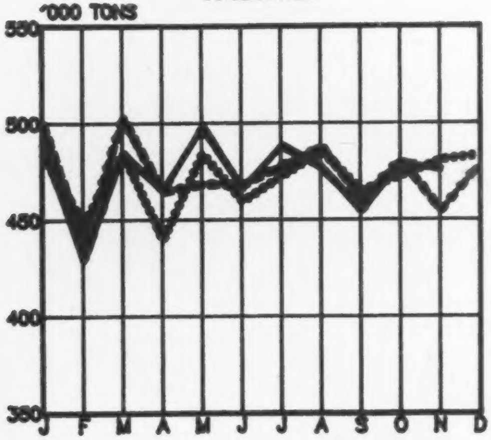
RECYCLED PAPERBOARD

PRODUCTION



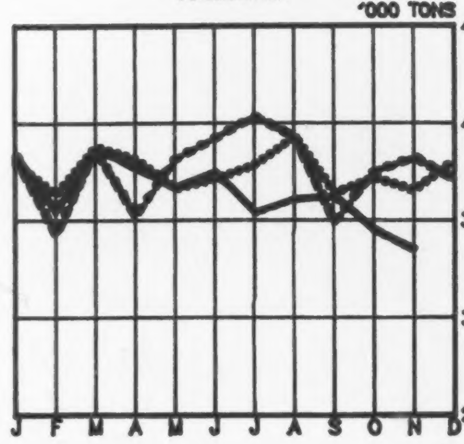
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1988 ········ 1989 ▬ ▬ ▬ 1990 ▬▬▬▬

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989		SEPTEMBER 1990		OCTOBER 1990		Annual Rate YTD 1990	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood Chips		805,361	27,759	64,394	2,188	50,514	1,358	705,178	-17.2
Total All Imports	A	18,288,860	11,352,263	1,381,405	871,258	1,622,875	1,014,888	18,437,918	0.1
Wood Pulp Total	A	5,005,100	2,980,842	367,313	209,480	445,312	246,529	5,008,451	-1.1
Waste Paper		172,575	33,197	8,930	2,015	9,910	2,179	127,287	-28.8
Other Fibrous Materials		11,254	8,518	808	489	1,400	1,029	14,037	13.0
Paper Board & Products Total	A	13,099,931	8,329,906	1,004,354	659,284	1,168,254	765,160	13,287,144	0.9
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	968,664	579,017	1,129,738	676,192	12,863,474	2.3
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,205	8,279,503	987,653	654,514	1,148,884	760,317	13,138,203	1.3
Paper & Paperboard Only	A	12,347,748	7,181,244	951,863	574,268	1,112,368	671,348	12,714,533	2.7
Paper Total	A	11,814,263	6,900,798	896,988	549,188	1,050,215	643,766	12,092,472	2.2
Newsprint	A	8,553,401	4,379,613	588,270	310,509	685,113	359,283	8,406,577	-2.0
Printing & Writing	A	2,732,978	1,996,141	262,848	192,121	308,252	225,007	3,119,016	13.8
Uncoated Groundwood		1,304,114	817,785	107,896	69,873	147,688	98,954	1,350,992	2.2
Coated Print.& Impreg. Pap.	A	774,022	632,484	82,822	65,498	81,021	63,516	958,704	23.3
Uncoated Free Sheet	A	583,077	462,404	66,379	50,275	73,376	57,702	730,785	28.0
Thin (except Cigarette)		12,711	15,200	961	1,065	1,268	1,369	11,289	-6.9
Bristols		59,052	68,267	4,790	5,389	4,899	5,567	67,247	14.1
Total Pkg & Other Paper		407,087	414,353	36,509	38,030	41,907	45,975	439,899	10.9
Unbleached Kraft Paper		239,303	116,011	21,114	10,532	24,557	12,695	246,201	4.9
Other Pkg. & Indust. Paper		167,785	298,342	15,395	27,498	17,350	33,280	193,698	18.5
Tissue		120,797	110,691	9,362	8,527	14,944	13,501	126,960	6.4
Paperboard, Total		533,486	280,446	54,975	25,080	62,153	27,582	622,062	13.8
Test or Containerboard		85,048	34,401	9,342	4,217	6,458	2,896	118,068	38.2
Semi-Chemical Corrugating		118,176	36,462	9,753	2,517	12,196	3,228	111,294	-5.7
Other Paperboard		330,262	209,584	35,879	18,346	43,499	23,024	391,700	18.0
Convtd Paper&Paperbd Products		562,457	1,098,259	35,690	80,247	36,516	88,969	423,669	-27.9
Paper Products, Total		470,471	924,729	26,975	64,247	26,536	70,202	318,374	-35.3
Paperboard Products, Total		91,986	173,529	8,714	16,000	9,980	18,767	105,296	10.3
Wet machine Board		606	580	131	116	31	33	1,168	110.1
Construction Paper & Board E		189,119	49,824	16,570	4,634	17,339	4,811	147,773	-25.7
Notes									
Other: No Weight Avail. ($000)			136,624		10,411		13,925	135,740	-3.8
Total Imports Incl. Other($000)			11,488,886		881,668		1,028,823	11,594,705	0.2

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989		SEPTEMBER 1990		OCTOBER 1990		Annual Rate YTD 1990	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	137,617	3,475	159,609	4,175	126,581	3,221	1,020,121	581.3
Pulpwood Chips	4,357,811	388,154	368,205	33,378	414,852	37,878	4,810,112	3.7
Total All Exports	18,633,605	8,603,945	1,613,179	766,161	1,658,693	777,094	19,422,372	2.7
Wood Pulp,Total	6,231,172	3,512,604	525,965	269,480	491,163	247,521	5,868,955	-5.8
Cotton Pulp and Other Pulp	122,045	100,510	15,343	11,301	10,732	7,931	138,863	14.8
Waste and Old Paper	5,980,620	729,797	491,407	56,351	579,253	66,562	6,424,793	6.2
Paper, Board & Products,Total	6,299,768	4,261,035	580,464	429,029	577,545	453,079	6,869,961	7.9
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,686	497,198	298,496	480,729	305,856	5,824,690	9.7
Paper, Ppbd & Prod ex Cnst&WMB	6,263,491	4,246,277	579,507	428,265	576,458	452,269	6,860,375	8.3
Paper & Paperboard, Only	5,223,456	2,967,928	496,241	297,732	479,642	305,046	5,815,104	10.3
Paper, Total	1,465,752	1,233,527	141,336	131,463	133,353	136,490	1,523,849	1.7
Newsprint	624,798	357,381	59,799	34,263	42,837	25,487	532,227	-18.5
Printing & Writing	478,201	485,168	53,827	57,278	62,367	71,621	678,752	42.1
Uncoated Groundwood	88,056	64,766	7,617	5,496	7,194	6,437	78,071	-16.4
Clay Coated Paper	168,538	131,418	18,207	17,878	22,511	22,382	228,750	36.9
Uncoated Free Sheet	122,348	186,830	17,933	23,372	20,350	30,859	233,033	90.4
Other Printing & Writing	99,260	102,154	10,070	10,530	12,312	11,943	140,898	37.1
Total Pkg. & Other Paper	342,041	380,790	24,526	36,075	24,675	35,265	280,627	-18.8
Unbleached Kraft	125,818	60,318	8,600	5,033	9,688	6,482	110,807	-11.3
Other Pkg. & Indust. Paper	216,223	320,472	15,927	31,042	14,987	29,783	169,820	-23.1
Tissue	20,712	30,187	3,184	3,847	3,474	4,115	32,243	45.8
Paperboard, Total	3,757,704	1,734,402	354,905	166,269	346,289	168,557	4,291,255	13.7
Solid Wood Pulp	3,572,758	1,646,152	340,712	157,729	328,552	158,606	4,059,226	13.3
Total Linerboard	2,499,716	935,364	247,169	89,450	238,624	87,610	2,977,617	18.5
Bleached Kraft Linerboard	283,113	127,787	33,474	14,451	36,098	16,016	321,311	16.0
Unbleached Kraft Linerbd	2,216,603	807,578	213,695	74,999	202,526	71,594	2,656,305	19.9
Other Unbleached Kraft	248,575	113,315	16,628	9,595	15,779	9,152	253,720	1.4
Other Bleached Kraft	795,305	582,979	71,047	56,715	70,056	60,396	778,206	-1.6
Semi-Chemical Corrugating	31,162	14,494	5,869	1,970	4,093	1,448	49,663	59.8
Recycled Paperboard	184,947	88,250	14,192	8,540	17,737	9,951	232,029	22.6
Convtd Paper&Paperbd Pruducts	1,040,035	1,278,349	83,266	130,533	96,816	147,223	1,045,271	-1.5
Paper Products, Total	473,435	832,806	36,879	87,314	40,581	92,721	434,738	11.0
Paperboard Products, Total	566,601	445,543	46,387	43,219	56,234	54,502	610,533	6.8
Wet Machine Board	2,889	1,256	28	10	12	5	570	-82.4
Construction Paper & Board E	33,398	13,501	930	754	1,074	805	9,016	-73.5
Notes								
Other: No Weight Avail. ($000)		23,665		3,874		4,726	50,154	111.8
Total Exports Incl. Other($000)		8,627,611		770,034		781,820	9,245,878	5.5

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR 1988	YEAR 1989	AUG 1990	SEP 1990	OCT 1990	NOV 1990	Annual Rate Y-T-D 1990	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	124.8	132.4	132.8	132.6	132.9	133.0	133.0	0.5
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	123.8	132.0	132.7	132.6	132.9	133.1	132.9	0.7
Total Wood Pulp	136.7	157.4	152.7	150.1	147.3	145.7	153.3	−2.5
Total Paper	123.2	129.6	128.8	129.8	130.2	130.2	128.7	−0.8
Writing Paper, exc. Newsprint	123.4	130.5	129.2	130.3	130.6	130.7	129.1	−1.2
Newsprint	127.6	122.5	121.9	121.8	122.0	122.2	119.2	−3.0
Total Paperboard	133.2	140.1	135.5	133.1	133.9	135.0	136.2	−2.8
Total Paper and Paperboard *	126.4	132.9	130.9	130.8	131.4	131.7	131.1	−1.4
Converted Products	123.0	131.7	135.1	135.2	135.7	135.8	135.1	2.8
Waste Paper	183.6	157.1	136.3	130.0	130.0	129.0	139.3	−11.6
All Commodities	106.9	112.2	114.3	118.3	120.8	120.1	115.9	3.3
Industrial Commodities	106.3	111.6	113.2	118.3	121.3	120.6	115.2	3.3

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

PAPER AND ALLIED PRODUCTS INDUSTRY
SALES, EARNINGS AND BALANCE SHEET DATA
1981 – 1990
(Millions of Dollars)

	Net Sales	Net Profit Before Taxes	Net Profit Before Taxes to Net Sales (%)	Taxes	Net profit After Taxes	Net Profit After Taxes to Net Sales (%)	Stock-holders Equity	Return on Equity (%)	Long-term Debt	Total Assets
1981	62,502	4,728	7.6	1,621	3,108	5.0	26,452	11.7	11,633	50,706
1981 R	62,699	4,728	7.5	1,617	3,110	5.0	26,558	11.7	11,705	50,912
1982	60,293	2,120	3.5	660	1,460	2.4	26,705	5.5	13,149	52,915
1983	66,100	3,439	5.2	1,102	2,337	3.5	27,509	8.5	13,946	56,126
1983 R	65,008	3,424	5.3	1,096	2,327	3.6	27,219	8.5	13,565	54,821
1984	71,891	4,812	6.7	1,798	3,015	4.2	28,160	10.7	13,802	58,520
1985	71,761	4,424	6.2	1,533	2,891	4.0	29,780	9.7	15,262	62,613
1985 R	71,465	4,399	6.2	1,519	2,880	4.0	29,694	9.7	15,262	62,505
1986	74,896	5,318	7.1	2,025	3,293	4.4	31,254	10.5	18,920	69,132
1986 R	74,844	5,298	7.1	2,018	3,280	4.4	31,221	10.5	18,906	69,082
1987	86,603	8,077	9.3	3,088	4,989	5.8	35,162	14.2	20,152	76,791
1987 R	95,576	8,860	9.3	3,338	5,520	5.8	39,217	14.1	22,417	85,279
1988	107,014	12,204	11.4	4,127	8,077	7.5	42,933	18.8	27,067	95,296
1988 R	107,221	12,210	11.4	4,129	8,081	7.5	42,940	18.8	27,160	95,444
1989	112,238	10,771	9.6	3,771	7,000	6.2	45,888	15.3	33,193	107,572
1989 R										
First Quarter	110,376	12,172	11.0	4,184	7,992	7.2	43,811	18.2	29,016	98,562
Second Quarter	115,448	12,412	10.8	4,344	8,068	7.0	44,954	17.9	31,248	102,895
Third Quarter	113,824	11,876	10.4	4,388	7,488	6.6	46,246	16.2	32,909	105,834
Fourth Quarter	114,644	7,000	6.1	2,360	4,640	4.0	45,642	10.2	34,543	109,038
Total	113,573	10,865	9.6	3,819	7,047	6.2	45,642	15.4	34,543	109,038
1990										
First Quarter	114,136	8,412	7.4	2,856	5,556	4.9	48,519	11.5	37,028	114,912
Second Quarter	115,376	9,388	8.1	2,868	6,520	5.7	45,597	14.3	36,921	111,321
Third Quarter	115,448	7,636	6.6	2,652	4,984	4.3	46,185	10.8	38,460	113,708
Annual Rate, Y-T-D	114,987	8,479	7.4	2,792	5,687	4.9	46,185	12.3	38,460	113,708

NOTE: Quarterly data are at annual rates.
R=Revised to reflect changes in the number of companies classified to this industry.

SOURCE: Quarterly Financial Report for Manufacturing, Mining, and Trade Corporations – Bureau of the Census, U.S. Department of Commerce.

Paperboard: Paperboard exports were an important source of the growth in paperboard production. Production of containerboard for export -- which accounted for nearly three-quarters of the export total -- was 11% above its year-ago total in the first ten months of 1990 while boxboard production for export gained 9%.

Within the domestic market, production of containerboard for use in fiber boxes showed a 1.9% increase, nearly matching the 1.4% increase reported for shipments of fibre boxes. While containerboard inventories at mills and plants showed a small increase in November, the total was only 4% higher than it was in November 1989.

The industry's shift to recycled papers for its fiber is evident in the 5% gain posted for production of recycled corrugating medium. Unbleached kraft paperboard continues to dominate the linerboard grades and total production of unbleached kraft paperboard -- including exports -- was up by 3.6%.

Domestic boxboard demand has shown little strength this past year; the eleven-month production total was down by 2.1%. Demand for the recycled grades increased, with production of recycled folding boxboard up 1.2% and setup boxboard 3.8%. Total recycled paperboard production, however, was fractionally below its year-ago level.

FIBROUS MATERIALS

API's December 1990 Capacity Survey reported that paper and paperboard mills consumed 19,490,000 tons of waste paper in 1989, and planned to consume 21,039,000 tons -- 8% more -- in 1990. While the new 1989 figure was 520,000 tons -- 2.6% -- below the planned total reported in the December 1989 Capacity Survey, the planned total for 1990 was only 1% below the figure reported last year.

The Survey also showed total consumption of waste paper at paper, paperboard, construction paper and board and molded pulp mills in 1989 at 20,442,000 tons and indicated a 7.8% gain in 1990, to 22,044,000 tons. Planned consumption at full capacity in 1993 was 27,148,000 tons, representing a 7% per year growth. The growth planned for consumption of wood pulp was 2% per year.

Total waste paper collection in 1990, estimated from the new consumption data plus present rates of net imports of waste paper and an estimate of use of waste paper outside the paper industry (insulation and animal bedding are examples), would be 27.8 million tons. This represents a collection rate of about 33% of the total 1990 estimated new supply.

Production of chemical paper grade market pulp moved down to an 88% capacity utilization level in November 1990, from the 96% reported for October and for the entire 11 months of 1990. The year-to-date 1990 total was 2.2% above that of 1989, while shipments rose by 3.0%. The gain in shipments stemmed from increases to Western Europe, Latin America and the Asian/African countries (excluding Japan). Shipments to the domestic market declined by 2.4%.

SALES AND EARNINGS

The Department of Commerce recently released third quarter 1990 data on sales and earnings of paper and allied products companies. These data, summarized in the table at the bottom of page 10, indicate that the total industry trends during the first three quarters of 1990 were remarkably similar to those shown here last month for the published data on 23 paper companies. The Census data are more detailed; some of this additional data is presented in the table. Year-to-date changes for sales, after-tax earnings, depreciation and net worth are shown in the attached Data Sheet.

PAPER INDUSTRY CAPACITY TRENDS

U.S. capacity to produce paper and paperboard expanded 2.3% in 1990, to 84.0 million tons, and is slated to increase at an average rate of 2.9% a year in the 1991-93 period, according to API's latest Capacity Survey released in early December. The previous survey projected paper and paperboard capacity growth at 3.4% a year for the 1990-1992 period. Growth for that same three-year time span is now placed at 2.9% a year, which is closer to the 2.4% trend rate that prevailed during the past ten years. The current slower growth partly reflects project delays and stretch-outs caused by increasing concerns about the economy.

Industry wood pulp capacity is slated to expand at an average annual rate of 1.8% in the 1991-93 period, to reach a 1993 level of 69.2 million tons. Increased waste paper consumption is expected to offset the slower growth in wood pulp capacity. Capacity dedicated to the production of market wood pulp will increase at a 4.2% annual rate from 1991 through 1993. This above-trend rate of expansion reflects the industry's strong participation in global pulp markets.

Copies of the Capacity Survey have been sent to API member companies. The Survey is available to nonmembers for $350 each, domestically, and $375, overseas, from Capacity Survey, Dept. CMS, American Paper Institute, 260 Madison Avenue, New York, N.Y. 10016.

CAPACITY GROWTH PATTERNS
(000 short tons)

	Paper & Paperboard	% Growth	Wood Pulp	% Growth
1980	66,368	2.7	53,215	3.1
1987	78,186	3.2	61,172	2.4
1988	80,533	3.0	62,950	2.9
1989	82,158	2.0	64,289	2.1
1990 E	84,040	2.3	65,504	1.9
1991 E	87,260	3.8	67,440	3.0
1992 E	89,519	2.6	69,113	2.5
1993 E	91,527	2.2	69,193	0.1

Source: American Paper Institute: Paper, Paperboard, Wood Pulp Capacity, 1989 - 1993.

MONTHLY STATISTICAL SUMMARY INSERT
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DECEMBER, 1990

PRODUCTION (000 TONS)

	(P) NOV 1990	(R) OCT 1990	NOV 1989	FIRST 11 MONTHS 1990	1989	% CHANGE YR TO DATE 1990/1989
PAPER GRADES						
Newsprint	564	563	516	6,038	5,556	8.7
Printing & Writing	1,823	2,002	1,823	20,560	19,921	3.2
Uncoated Groundwood (s)	153	168	152	1,623	1,621	0.1
Coated Groundwood (s)	338	387	362	3,851	3,718	3.6
Coated Free Sheet (s)	269	302	255	3,065	2,911	5.3
Total Coated Paper (s)	606	689	617	6,916	6,629	4.3
Uncoated Free Sheet Paper (s)	943	1,010	934	10,582	10,216	3.6
Thin Paper (s)	17	19	17	204	227	-9.9
Cotton Fiber Paper (s)	12	14	12	149	149	0.1
Bleached Bristols (s)	92	103	91	1,086	1,080	0.6
Tissue Paper	465	507	474	5,306	5,176	2.5
Total Pkg & Other Paper	384	415	428	4,258	4,515	-5.7
Unbl. Kraft Paper (s)	196	208	241	2,204	2,465	-10.6
Other Paper	188	206	188	2,055	2,050	0.2
TOTAL PAPER	3,237	3,486	3,240	36,163	35,169	2.8
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,716	1,754	1,574	18,559	17,921	3.6
Unbleached Kraft Linerboard	1,610	1,644	1,481	17,424	16,719	4.2
Other Unbl. Kraft Paperboard	106	110	94	1,135	1,201	-5.5
Semichemical Paperboard	477	480	455	5,216	5,211	0.1
Bleached Paperboard	336	346	383	4,012	4,149	-3.3
Recycled Paperboard	724	764	728	8,070	8,102	-0.4
TOTAL PAPERBOARD	3,253	3,344	3,141	35,856	35,383	1.3
TOTAL PAPER AND PAPERBOARD	6,489	6,830	6,381	72,019	70,552	2.1

WOOD PULP (ALL GRADES)	OCT 1990	SEPT 1990	OCT 1989	FIRST 10 MONTHS 1990	1989	% CHANGE YR TO DATE 1990/1989
Dissolving & Special Alpha	91	126	110	1,099	1,176	-6.5
Bleached Sulfite)	133	112	132	1,308	1,318	-0.7
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,334	2,226	2,282	22,966	22,689	1.2
Unbleached Sulfate	1,944	1,852	1,862	18,480	18,149	1.8
Semichemical	361	349	379	3,579	3,655	-2.1
Groundwood & Thermomechanical	578	536	530	5,356	5,000	7.1
TOTAL PULP DIVISION DATA	5,442	5,200	5,295	52,788	51,986	1.5

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA December 31, 1990	1988	1989	1990	1990 R	1990 P	AN RATE Y-T-D 90	% CH/ SAME PD 89
PAPER AND PAPERBOARD --- Tons (000)			SEPTEMBER	OCTOBER	NOVEMBER		
Total Production (API)..................: excluding :..............................	76,489	76,713	6,504	6,830	6,489	78,566	2.1
Total Seasonally Adjusted..........: construction :..............................			6,595	6,667	6,594	78,406	2.1
Imports (including Products).......: and wet :......E..............................	12,788	12,910	968	1,149	1,075	13,117	1.0
Exports (including Products).......: machine :......E..............................	5,559	6,264	580	576	586	6,876	9.6
Apparent Consumption...............: grades :..............................	83,697	83,359	7,003	7,239	7,063	84,806	1.5
Paper Production % Tonnage Capacity..............................	95.4	92.9	93.7	96.2	92.3	93.7	–
Paperboard Production % Tonnage Capacity..............................	94.5	93.8	94.9	92.6	92.8	93.8	–
PAPER, PAPERBOARD AND PRODUCTS			AUGUST	SEPTEMBER	OCTOBER		
Imports.....:Including Construction and :..............................	13,110	13,101	1,105	1,004	1,166	13,287	0.9
Exports.....: WMB Grades (excl. HPB) :..............................	5,691	6,300	604	580	578	6,870	7.8
MARKET WOOD PULP PRODUCTION – Tons (000)..............................	8,565	8,664	818	734	726	8,890	1.1
TOTAL WOOD PULP PRODUCTION – Tons (000)..............................	61,161 f	61,896 f	5,366	5,200	5,442	63,346	1.5
WOOD PULP IMPORTS – TONS (000)..............................	5,038	5,005	416	367	445	5,009	-1.1
WOOD PULP EXPORTS – TONS (000)..............................	5,526	6,231	554	526	491	5,989	-5.8
RAW MATERIALS CONSUMPTION – Tons (000)							
PAPER AND BOARD MILLS....: excluding :..............................			AUGUST	SEPTEMBER	OCTOBER		
Wood Pulp...............................: consumption for :..............................	60,294	60,727	5,178	5,034	5,391	61,937	1.5
Waste Paper...............................: construction & :..............................	19,021	20,010	1,844	1,797	1,834	21,185	5.5
TOTAL...............................: WMB grades :..............................	79,315	80,737	7,022	6,831	7,225	83,122	2.5
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	95,497	98,414	8,333	8,326	8,517	99,674	0.8
EMPLOYMENT (000)			SEPTEMBER	OCTOBER	NOVEMBER		
Paper and Allied Products..........Total..............................	692.6	697.1 RS	701.0	696.9	696.0	698.7	0.2
Pulp, Paper and Board Mills........Total......A..............................	247.2	229.6 RS	229.1	227.3	227.2	229.4	0.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			SEPTEMBER	OCTOBER	NOVEMBER		
Paper and Allied Products..............................	11.86	11.96 RS	12.42	12.43	12.57	12.28	2.8
Pulp, Paper Mills......A..............................	14.31	14.73 RS	15.44	15.44	15.64	15.18	3.2
Paperboard Mills.......E..............................	14.49	14.76 RS	15.42	15.58	15.74	15.21	3.3
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1989 Q4	1990 Q1	1990 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	10.92	15.58	17.44	17.56	18.59	17.36 Y	11.4
INDEX OF OUTPUT PER MAN-HOUR (1977=100)			SEPTEMBER	OCTOBER	NOVEMBER		
:IN PULP, PAPER :...Production Workers..............................	146.0	148.0 RS	151.7	151.8	150.6	150.6	1.4
:AND BOARD MILLS:...All Employees..............................	142.8	144.6 RS	148.3	148.9	147.2	147.2	1.4
PAPER AND ALLIED PRODUCTS (Million $)			SEPTEMBER	OCTOBER	NOVEMBER		
Industry Shipments (Dept. of Commerce)*..............................	127,718	130,501	11,046	10,968	11,000	144,475	0.4
Pulp, Paper and Paperboard*..............................	57,177	57,700	4,862	4,753	4,725	62,005	-2.8
Inventories (End of Period) – Total Industry*..............................	12,065	12,571	12,755	12,769	12,772	12,772	1.7
Pulp, Paper and Paperboard*..............................	4,325	4,980	5,212	5,205	5,225	5,225	4.5
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q1	1990 Q2	1990 Q3		
Sales (Corporations Only)..............................	107,221	113,573	28,534	28,844	28,862	114,987	1.6
Earnings (Corporations Only)..............................	8,081	7,047	1,389	1,630	1,246	5,687	-27.6
Depreciation (Corporations Only)..............................	4,625	5,010	1,347	1,341	1,380	5,424	9.7
Net Worth (Corporations Only)..............................	42,940	45,642	48,519	45,597	46,185	46,185	-0.1
PRICE INDEXES (Bureau of Labor Stats)1982=100			SEPTEMBER	OCTOBER	NOVEMBER		
Pulp, Paper & Products, ex. Building Grades..............................	124.8	132.4	132.8	132.6	132.9	133.0	0.5
Wood Pulp..............................	136.7	157.4	152.7	150.1	147.3	153.2	-2.6
Waste Paper..............................	183.6	157.1	136.3	130.0	130.0	139.3	-11.6
Paper..............................	123.2	129.6	128.8	129.8	130.2	128.7	-0.8
Paperboard..............................	133.2	140.1	135.5	133.1	133.9	136.2	-2.8
PAPER DEMAND (INDEXED: 1967=100)			SEPTEMBER	OCTOBER	NOVEMBER		
Total Paper Production *..............................	103.9	103.6	105.9	109.4	105.7	106.8	2.8
Paper New Supply *..............................	103.6	102.3	101.2	107.8	103.2	104.9	2.3
Demand Indicators – (Weighted Average) *..............................	103.8	107.8	109.6	109.2	108.7	109.8	2.0
Production of Nondurable Goods..........*....(21.2%)..............................	103.6	106.4	107.6	107.2	108.6	107.8	1.1
Disposable Income..........................*....(23.9%)..............................	104.4	107.2	107.9	107.0	107.0	108.1	1.5
Total Printing and Publishing..............*....(54.9%)..............................	103.6	108.6	111.2	111.0	110.3	111.4	2.7
PAPERBOARD DEMAND (INDEXED: 1967=100)			SEPTEMBER	OCTOBER	NOVEMBER		
Total Paperboard Production *..............................	101.7	102.6	107.0	105.9	107.1	104.2	1.3
Production for Domestic Use	102.0	102.7	106.1	106.4	106.1	103.5	0.5
Demand Indicators – (Weighted Average) *..............................	104.7	107.2	109.0	108.0	105.9	107.9	0.7
Production of Consumer Goods.............*....(62.06%)..............................	104.0	106.6	106.1	107.0	104.9	107.1	0.6
Production of Equipment...................*....(5.75%)..............................	107.5	112.3	117.8	117.0	115.3	115.7	3.1
Production of Materials....................*....(32.19%)..............................	105.6	107.4	109.3	108.2	108.2	107.9	0.5
MARKET DATA			AUGUST	SEPTEMBER	OCTOBER		
Consumption by Publishers – Tons (000)..............................	13,497	13,493	1,096	1,118	1,147	13,332	-0.2
Newspaper Pub. and Printing Empl. Total(000)..............................	475	473	479	479	479	477	1.2
Magazine Advertising Pages (PIB, Inc.)	172,580	181,580	11,346	16,409	17,744	169,346	-4.8
Wholesalers Sales and Inventories (Million $)			AUGUST	SEPTEMBER	OCTOBER		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales..............................	46,554	50,740	4,736	4,307	4,872	52,830	4.3
Inventories (End of Period)..............................	3,959	4,137	4,088	4,161	4,304	4,304	0.7
FIBRE BOX DATA (Fibre Box Association)			SEPTEMBER	OCTOBER	NOVEMBER		
Fibre Box Shipments (Million square feet)..............................	308,507	313,400	25,410	30,526	24,965	321,155	1.4
Container'bd Inventory at Mill & Plant (000 Tons)..............................	2,553	2,589	2,570	2,486	2,548	2,548	4.0
RETAIL TRADE (Billion $)							
Total Retail Sales *..............................	1,622	1,711	151.6	151.8	151.6	1,800	5.3
Nondurable Goods Stores Sales *..............................	995	1,062	97.8	97.8	98.3	1,150	8.6
GENERAL ECONOMIC DATA			SEPTEMBER	OCTOBER	NOVEMBER		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*..............................	105.4	108.1	110.4	109.4	107.5	109.2	1.1
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)..............................	106.9	112.2	118.3	120.8	120.1	115.8	3.3
CONSUMER PRICES (ALL ITEMS–URBAN CON.) (1982–4=100)..............................	118.3	124.0	132.7	133.5	133.8	130.4	5.3
GROSS NATIONAL PRODUCT – ANNUAL RATE (Billion$)			1990 Q1	1990 Q2	1990 Q3		
G.N.P. or Expenditure – Current $..............................	4,874	5,201	5,375	5,443	5,515	5,444	5.3
G.N.P. or Expenditure – 1982 $..............................	4,017	4,118	4,151	4,155	4,170	4,159	1.1
PAPER AND PAPERBOARD CONSUMPTION – POUNDS PER CAPITA	677	667				678	

f – Wood Pulp Prod exc del., explo & scr. R – Revised RS – Revised series E – Last month estimated by API A – Estimated by API Y – Full year estimated by Dep't of Commerce * Seasonally Adjusted

A2500-2

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.1 JANUARY 1991

PAPER AND PAPERBOARD: 1990
PRODUCTION REMAINS HIGH; PROFITS DOWN

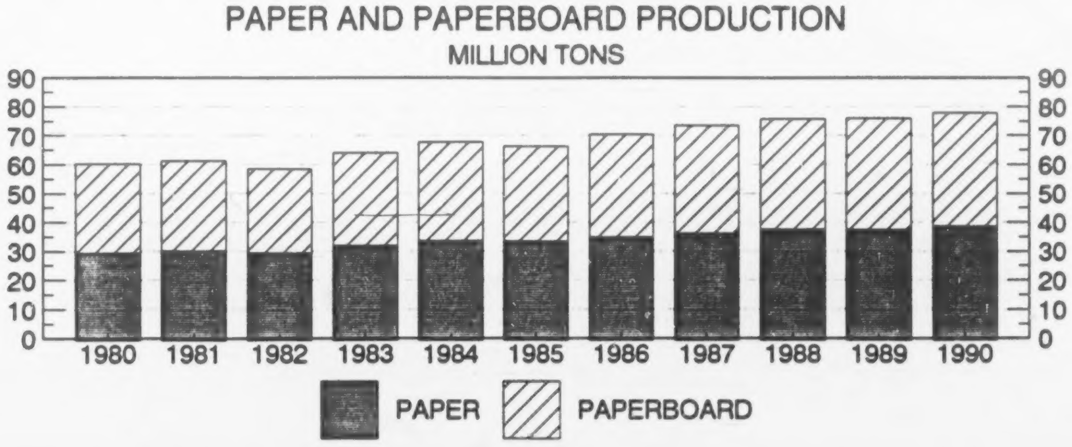
Paper and paperboard production moved to a record 78.6 million tons in 1990, 2.4% above the 1989 high, with paper production up 3.0%, paperboard 1.8%. The average value of shipments per ton of output, however, was slightly below its year-ago level, and the estimated increase in the value of shipments was only 1%. After-tax profits fell by an estimated 20%, moving the return on sales back to mid-1980s levels.

Total demand for paper and paperboard, as measured by new supply (production plus imports less exports plus net imports of converted products), also moved to a new high. At an estimated 84.8 million tons, demand was 1.8% above its year-ago high. It was equivalent to 680 pounds per capita, unchanged from 1988.

Although the fourth quarter 1990 production total was at a record high, the strength was concentrated in October and November, with production of paper falling in December (see table on page 3).

The chart below shows annual totals of paper and paperboard production from 1980 to 1990. It highlights the steep growth trend in the 1982-1988 period, the subsequent leveling in 1988 and 1989, and the jump to a new high in 1990.

Paper: Paper production peaked in July-October 1990 at a seasonally adjusted annual rate of 39.8 million tons, but fell to 38.2 million tons per year in December. The declines were centered on printing-writing and kraft papers; newsprint and tissue were up slightly and "other" papers remained steady.



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The strength in 1990 newsprint production stemmed from the four new machines that came on line during the past year-and-a-half. The total, estimated at a record 6.6 million tons, was 8.7% ahead of the 1989 figure, with the operating rate at 97%. The rate of newsprint consumption, however, has been trending downward since the middle of 1990, bringing the annual total about 1% below that of 1989.

Shipments of printing-writing papers fell in December, bringing the year's total to 22.4 million tons. This was, nonetheless, a new high, 3.5% above the 1989 level and 2.4% above the previous high established in 1988.

The steepest growth was evident in shipments of coated free sheet papers, which posted an above-average 4.8% gain. Uncoated free sheet papers grew 3.9%, with the operating rate at 94.8%. Much of the strength was concentrated in the bond and writing papers, which comprised about 27% of the total. Office copy papers, and cut-size papers for personal computers, account for the major part of these grades. Envelope and offset papers, which combine to make up about 35% of the total, also reported above-average gains.

Tissue paper production rose to a new high, 2.9% above its 1989 total.

Shipments of unbleached kraft papers were 11.4% under their 1989 level, intensifying a decline that started in the mid-1980s. Consumption of these papers, however, supported by an 11% gain in imports and an additional 160,000 tons of recycled packaging papers, was only 1.1% below the corresponding year-ago total. Shipments of bleached kraft papers gained 3.5% from 1989 to 1990, as increases in the multiwall bag, wrapping and converting sectors offset declines in grocers and other bag and sack papers. Shipments of other papers -- specialty packaging and special industrial -- held at their 1989 total.

Paperboard: In contrast to the paper grades, paperboard production strengthened in December 1990, reaching a level only fractionally below the March 1990 monthly high. Bolstered by an 11.6% gain in production for export, the 1990 total reached a record 39,156,000 tons, 1.8% above 1989's. The export gain was concentrated in the unbleached kraft grades. At 74% of the total, these exports rose 13.3%, while the bleached kraft (SBS) grades -- 20% of the total -- increased by 5.9%.

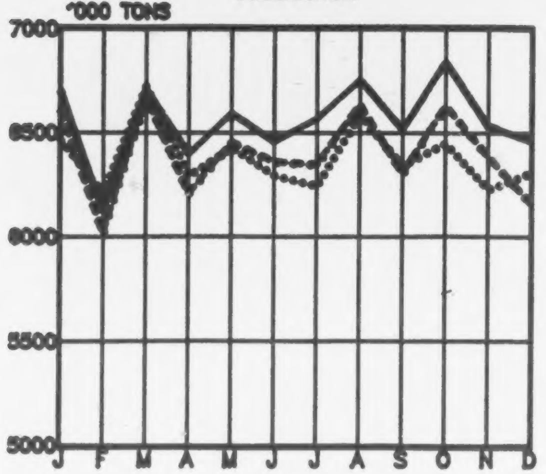
Production of containerboard for the domestic market also moved to a new high, rising 2.4% over 1989. Shipments of fiber boxes, at a record 315.8 billion sq. ft., were 0.8% above their 1989 total. A significant part of the containerboard production was diverted to inventory in the late months of 1990, bringing the year-end mill total 44% -- 84,000 tons -- above its year-ago level; inventories at plants were up by 4.6% -- 111,000 tons. The total at mills and plants as of the end of 1990 was equivalent to 6.0 weeks of supply.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		SEPT	OCT	NOV (R)	DEC (P)	Annual Rate Y–T–D	% Change From Same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
PAPER								
Newsprint – Production	5,982	6,088	549	563	564	576	6,615	8.7
– Shipments	5,969	6,079	561	557	564	576	6,628	9.0
Printing & Writing: Total Shipments	21,860	21,626	1,832	2,003	1,865	1,763	22,381	3.5
Groundwood Paper – Shipments	1,624	1,743	137	168	151	147	1,768	1.4
– New Orders	1,654	1,741	173	163	136	161	1,834	5.3
– Unfilled Orders	208	193	226	222	213	215	215	11.4
Coated Groundwood – Shipments	4,204	4,059	360	387	369	327	4,214	3.8
Coated Free Sheet – Shipments	3,155	3,157	276	302	273	237	3,307	4.8
Total Coated Papers – Shipments	7,359	7,215	636	689	642	564	7,522	4.2
– New Orders	7,412	7,171	607	671	589	531	7,424	3.5
– Unfilled Orders	751	706	693	693	643	591	591	–16.3
Unctd Free Sheet – Shipments	11,277	11,081	928	1,009	942	930	11,510	3.9
– New Orders	11,298	11,097	936	996	888	862	11,499	3.6
– Unfilled Orders	790	748	820	818	778	685	685	–8.5
Thin Papers – Shipments	281	262	17	20	19	14	234	–10.8
Cotton Fiber Paper – Shipments	169	161	13	14	13	11	161	0.2
Bleached Bristols – Shipments	1,150	1,164	101	102	98	96	1,188	2.0
Tissue Paper – Production	5,476	5,636	487	507	477	484	5,802	2.9
Total Packaging & Other Paper	5,033	4,916	383	411	383	359	4,611	–6.2
Unbl. Kraft Paper – Shipments	2,800	2,681	198	208	196	173	2,377	–11.4
Other Paper – Production	2,233	2,235	186	203	187	187	2,235	0.0
TOTAL PAPER PRODUCTION – UNADJUSTED	38,352	38,266	3,251	3,484	3,290	3,183	39,410	3.0
TOTAL PAPER PRODUCTION – SEAS ADJ			3,261	3,360	3,304	3,197	39,382	3.0
PAPERBOARD – PRODUCTION								
Containerboard	26,225	26,428	2,264	2,342	2,281	2,376	27,265	3.2
Cont'bd For Dom Use for Fibre Boxes	23,563	23,752	2,064	2,125	2,079	2,066	24,320	2.4
Total Linerboard	16,177	16,399	1,454	1,499	1,453	1,426	16,870	2.9
Unbleached Kraft	15,601	15,833	1,419	1,455	1,405	1,388	16,404	3.6
Solid Bleached	170	178	12	11	11	10	132	–25.8
Recycled	407	388	23	32	38	29	334	–13.9
Corrugating Medium	7,351	7,339	609	626	625	640	7,443	1.4
Semichemical	5,528	5,554	447	469	469	480	5,566	0.2
Recycled	1,823	1,785	163	157	156	160	1,877	5.1
Container Chip and Filler	35	14	0	1	1	0	7	–49.3
Other Containerboard for Dom Use	320	307	23	25	17	24	282	–8.0
Containerboard for Export	2,342	2,369	177	191	185	285	2,662	12.4
Boxboard	11,878	12,029	993	1,002	954	945	11,891	–1.1
Boxboard for Packaging for Dom Use	7,014	7,076	585	581	571	575	6,975	–1.4
Folding Boxboard	5,293	5,370	440	449	440	446	5,239	–2.4
Solid Bleached	2,017	1,980	152	143	139	159	1,827	–7.8
Unbleached Kraft	924	987	81	84	89	94	970	–1.7
Recycled	2,353	2,403	207	221	213	193	2,442	1.6
Set–up Boxboard for Dom Use	279	288	24	23	23	19	297	3.1
Milk Carton & Food Service Dom Use	1,442	1,419	121	109	108	111	1,439	1.5
Other Boxboard for Domestic Use	4,075	4,089	334	345	313	285	3,971	–2.9
Boxboard for Export	789	863	74	77	69	85	946	9.6
Paperboard Production by Furnish	38,103	38,456	3,257	3,344	3,234	3,321	39,156	1.8
Unbleached Kraft	19,140	19,490	1,700	1,754	1,698	1,795	20,335	4.3
Semichemical	5,664	5,691	455	480	477	494	5,710	0.3
Solid Bleached Kraft	4,511	4,521	363	346	336	369	4,380	–3.1
Recycled	8,788	8,754	739	764	723	663	8,731	–0.3
Paperboard Production for Export	3,132	3,232	251	268	254	370	3,608	11.6
Unbleached Kraft	2,296	2,363	177	189	188	289	2,678	13.3
Semichemical	136	138	9	12	8	14	143	4.3
Bleached Kraft	628	693	59	63	56	64	734	5.9
Recycled	72	38	7	4	3	3	52	38.0
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,103	38,456	3,257	3,344	3,234	3,321	39,156	1.8
TOTAL PAPERBOARD PROD – SEAS ADJ			3,338	3,304	3,324	3,395	39,125	1.8
PAPER AND PAPERBOARD – UNADJ	76,455	76,722	6,507	6,828	6,524	6,504	78,566	2.4
PAPER AND PAPERBOARD – SEAS ADJ			6,599	6,664	6,628	6,591	78,507	2.4

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

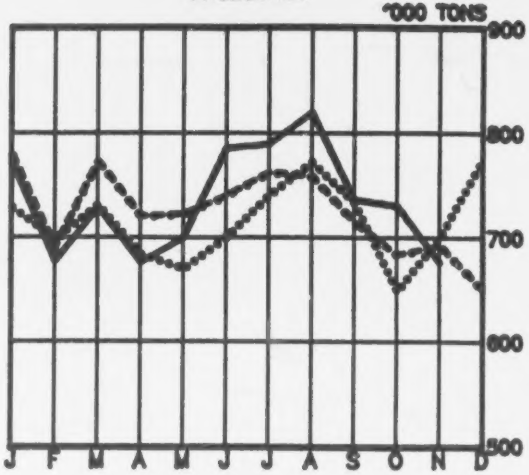
TOTAL PAPER AND PAPERBOARD

PRODUCTION



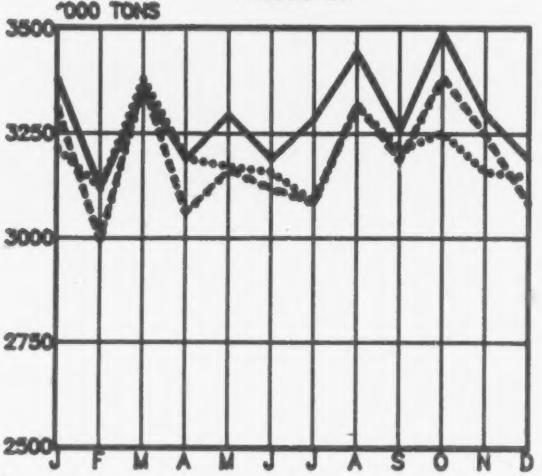
MARKET WOOD PULP

PRODUCTION



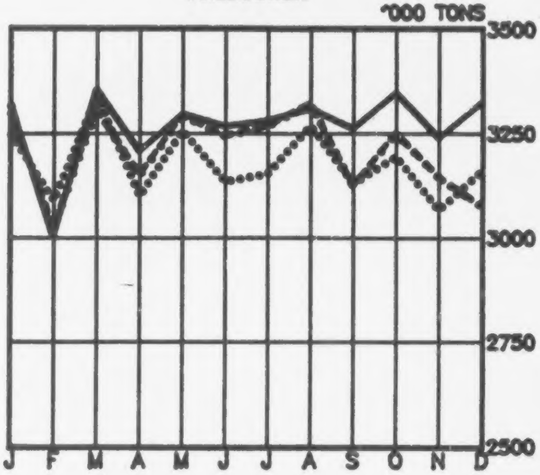
TOTAL PAPER

PRODUCTION



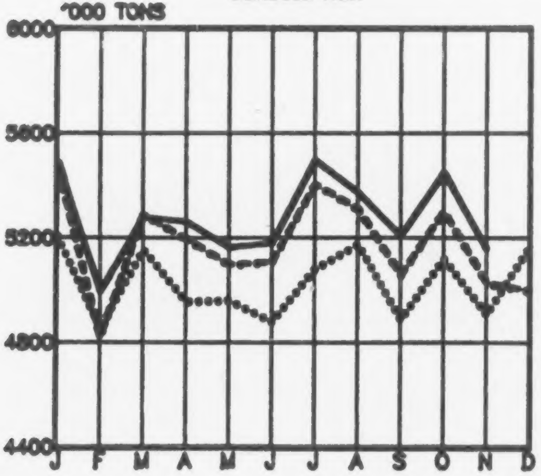
TOTAL PAPERBOARD

PRODUCTION



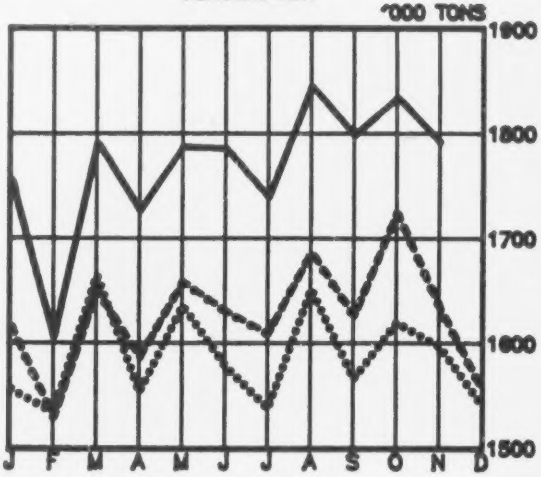
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1988 ········ 1989 – – – – 1990 ———

WOOD PULP STATISTICS (Thousands of Tons)		YEAR		AUG	SEPT	OCT (R)	NOV (P)	Annual Rate Y-T-D	% Change From Same Period
		1988	1989	1990	1990	1990	1990	1990	Last Year
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,161	61,998	5,366	5,200	5,442	5,150	63,205	1.6
	Imports A	5,038	5,005	416	367	445	390	4,979	-0.9
	Exports	5,528	6,231	554	526	491	438	5,922	-3.9
	New Supply	60,671	60,772	5,229	5,042	5,396	5,101	62,299	2.0
Dissolving Pulp	Production	1,367	1,425	125	126	91	71	1,277	-10.6
	Imports	248	284	8	18	21	20	217	-24.2
	Exports	865	836	66	77	56	57	778	-4.4
	New Supply	751	873	67	66	56	34	716	-20.5
Paper Grades Chemical Pulp	Production	49,493	50,181	4,374	4,190	4,410	4,175	51,195	1.6
	Imports A	4,419	4,370	373	318	392	348	4,400	0.1
	Exports	4,612	5,325	485	446	433	378	5,101	-3.3
	New Supply	49,300	49,226	4,261	4,062	4,369	4,145	50,494	2.0
Groundwood and Thermo-Mech	Production	5,943	6,029	541	536	578	550	6,443	7.3
	Imports A	371	351	35	31	32	22	362	4.8
	Exports	51	70	3	3	2	3	43	-39.3
	New Supply	6,263	6,309	573	564	609	569	6,762	7.7
Semi-Chemical	Production	4,358	4,363	327	349	362	353	4,291	-1.8
	Imports								
	Exports								
	New Supply	4,358	4,363	327	349	362	353	4,291	-1.8
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,565	8,664	818	734	728	674	8,817	0.8
	Imports	3,557	3,539	258	250	293	258	3,260	-7.7
	Exports	5,071	5,309	521	527	447	416	5,520	5.2
	New Supply	7,051	6,893	556	457	574	515	6,557	-6.8
Dissolving Pulp	Production	1,365	1,422	128	125	91	71	1,279	-10.1
	Imports	206	210	5	18	16	17	167	-20.6
	Exports	798	821	57	80	55	52	768	-3.3
	New Supply	774	810	76	63	53	36	678	-19.2
Paper Grades Chemical Pulp	Production	7,200	7,242	688	607	635	603	7,530	2.8
	Imports	3,126	3,072	230	212	259	225	2,853	-6.9
	Exports	4,273	4,489	464	447	393	364	4,752	6.8
	New Supply	6,052	5,825	454	372	501	464	5,631	-5.1
Groundwood Pulp and All Other	Production	0	(0)	2	2	2	(0)	9	N.M.
	Imports RS	231	258	23	20	18	16	240	-6.9
	Exports	0	(0)	0	0	0	0	0	0.0
	New Supply	231	258	25	21	20	15	248	-3.6

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series.

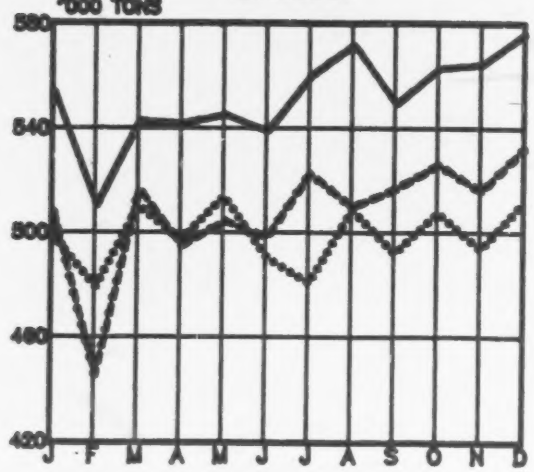
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR		AUG	SEPT	OCT (R)	NOV (P)	Annual Rate	% Change From Same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,217	7,022	6,831	7,225	6,862	83,052	3.3
Total Wood Pulp	60,294	60,727	5,178	5,034	5,391	5,073	61,840	1.6
Waste Paper	19,021	19,490 R	1,844	1,797	1,834	1,790	21,212	8.4
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	193	218	228	210	201	201	7.1
Producers' Market Inventories	261	342	527	461	472	494	494	10.8
Consumers' Purchased Inventories #	622	519	418	423	422	358	358	-32.3
Waste Paper at Paper & Bd. Mills	1,044	1,057	1,052	965	1,014	985	985	-8.5
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	14	19	24	22	22	23	23	-8.0

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API. # Includes all grades of wood pulp N.M. – Not Meaningful

P – Preliminary; R – Revised; (0) – Indicates zero to five-hundred short tons

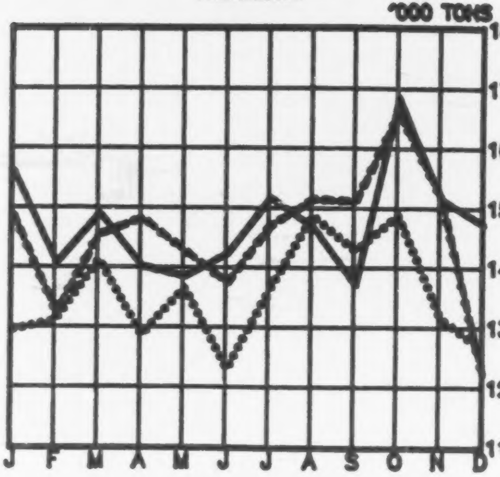
NEWSPRINT

PRODUCTION



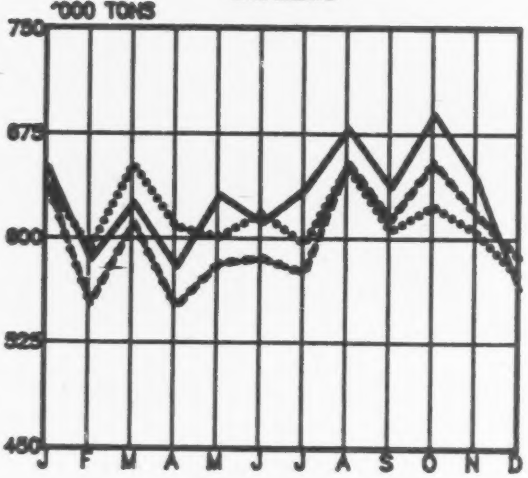
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



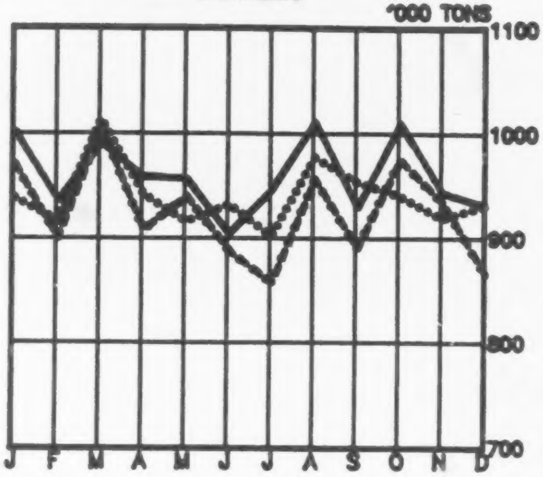
COATED PAPER

SHIPMENTS



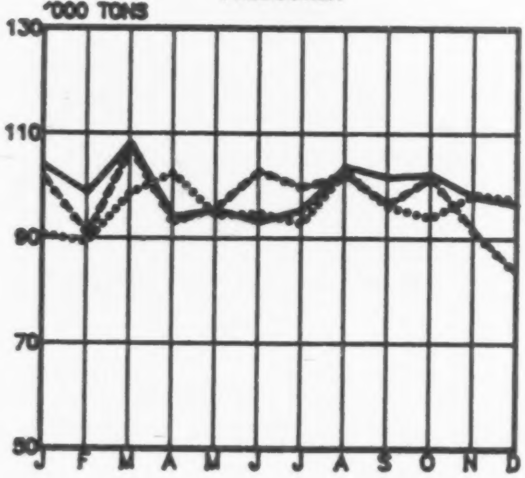
UNCOATED FREE SHEET PAPERS

SHIPMENTS



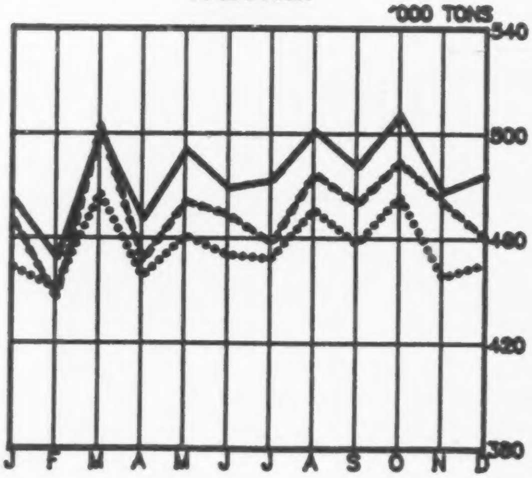
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1988 ········ 1989 - - - - - 1990 ———

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR		AUGUST	SEPT	OCTOBER	NOVEMBER	ANNUAL RATE Y-T-D	% CHANGE FROM SAME PD
	1988	1989	1990	1990	1990	1990	1990	LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	95,537	99,279	8,452	8,271	8,712	8,180	99,092	–0.1
– Total Consumpt	95,497	98,414	8,333	8,243	8,517	8,120	99,379	0.7
– Residues *	33,186	34,539	2,990	3,037	3,163	2,953	35,960	3.9
– Inventories	4,888	5,462	5,239	5,651	5,751	6,375	6,375	14.2
So. Atlantic – Total Receipts	31,582	31,982	2,651	2,836	2,726	2,616	32,660	1.5
– Total Consumpt	31,567	32,239	2,678	2,828	2,678	2,579	32,449	0.3
– Residues *	9,897	9,961	926	1,032	923	903	11,204	12.5
– Inventories	1,200	936	1,096	1,219	1,216	1,324	1,324	27.7
Northeast – Total Receipts	7,187	7,242	620	594	662	599	7,273	0.3
– Total Consumpt	7,216	7,072	590	565	596	534	7,115	–0.2
– Residues *	1,664	1,575	132	121	135	123	1,507	–5.9
– Inventories	572	522	382	401	439	458	458	–3.6
South Central – Total Receipts	33,751	35,840	3,278	3,055	3,366	3,149	37,295	3.4
– Total Consumpt	33,646	35,791	3,149	3,095	3,242	3,088	36,826	2.8
– Residues *	9,890	10,539	1,002	936	1,020	953	11,559	9.3
– Inventories	1,160	1,336	1,348	1,307	1,474	2,072	2,072	44.5
North Central – Total Receipts	6,865	7,020	623	543	614	583	7,065	0.6
– Total Consumpt	6,929	6,963	602	515	633	604	7,117	1.9
– Residues *	1,334	1,422	122	100	106	121	1,327	–6.2
– Inventories	839	938	960	1,012	1,011	1,004	1,004	10.5
West – Total Receipts	16,152	17,195	1,282	1,241	1,324	1,259	15,399	–10.6
– Total Consumpt	16,139	16,349	1,314	1,240	1,371	1,315	15,872	–2.9
– Residues *	10,401	11,042	808	846	980	853	10,364	–6.4
– Inventories	1,117	1,730	1,454	1,712	1,611	1,517	1,517	–12.1

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA *						ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
		YEAR 1989		OCTOBER 1990		NOVEMBER 1990			
		Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)		211,061	4,582	0	0	0	0	0	–100.0
Pulpwood chips		792,186	27,339	50,296	1,341	52,573	1,770	697,121	–15.0
Wood Pulp, Total	A	4,353,343	2,599,247	380,645	212,817	337,923	184,391	4,401,930	0.4
Waste Fibrous Materials, Total		164,217	31,659	10,368	2,454	10,347	2,661	134,206	–19.0
Paper, Board & Products, Total	A	10,986,831	6,104,181	964,601	556,353	925,548	545,910	11,262,273	2.3
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	A	10,807,659	5,782,419	952,366	526,104	913,899	514,221	11,134,844	2.7
Paper, Paperboard & Products	A	10,830,545	6,065,465	949,277	552,607	915,526	543,413	11,150,580	2.6
Paper & Paperboard, Only	A	10,651,373	5,743,703	937,042	522,358	903,877	511,724	11,003,150	3.0
Paper, Total	A	10,234,256	5,579,018	879,969	499,210	857,527	492,111	10,470,886	2.1
Newsprint	A	8,330,874	4,278,705	668,463	350,632	657,728	347,773	8,167,155	–2.0
Printing, Writing & Rel. Pap.	A	1,579,698	1,069,263	175,034	120,112	172,601	121,941	1,922,530	21.9
Pack. & Ind. Conv. Paper		217,159	119,140	21,793	12,721	15,464	9,558	218,358	0.9
Special Industrial Paper		49,045	60,344	4,795	6,721	4,430	6,108	58,229	19.9
Tissue Paper		57,481	51,567	9,883	9,024	7,303	6,732	84,615	48.5
Paperboard, Total		417,117	164,685	57,074	23,148	46,350	19,612	532,264	26.5
Convtd Paper&Paperbd Products		179,172	321,762	12,236	30,249	11,648	31,680	147,429	–20.5
Wet Machine Board		293	245	26	30	106	91	982	226.0
Construction Paper & Board		155,993	36,472	15,298	3,717	9,916	2,407	130,732	–19.3

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

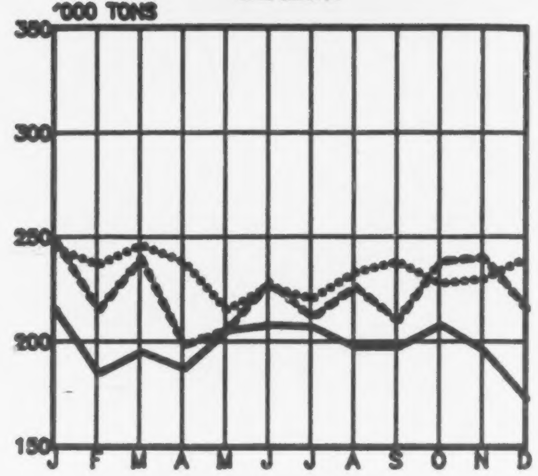
	EXPORTS TO CANADA *							
Pulpwood, Roundwood (in cubic meters)	62,892	1,120	122,423	3,120	178,609	4,362	1,040,523	1416.6
Pulpwood chips	28,218	1,241	19,621	881	15,353	657	195,374	546.7
Wood Pulp, Total	352,896	141,272	22,465	12,346	22,363	11,172	336,493	–2.1
Cotton Pulp & Other Pulp	6,215	4,249	207	209	453	396	4,393	–29.3
Waste Paper	284,379	38,555	60,720	10,859	54,179	9,445	669,067	135.1
Paper, Board & Products, Total	1,063,228	763,613	114,737	128,803	107,644	117,642	1,222,822	12.5
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	85,937	80,624	81,046	75,300	915,046	21.0
Paper, Paperboard & Products	1,062,560	755,810	114,439	128,583	107,495	117,510	1,220,479	14.4
Paper & Paperboard, Only	733,907	489,686	85,640	80,404	80,897	75,168	912,702	24.0
Paper, Total	371,206	340,312	52,390	59,384	48,303	54,709	532,487	43.4
Newsprint	8,316	5,891	3,111	1,730	2,260	1,228	21,317	164.1
Printing, Writing & Rel. Pap.	228,021	222,055	37,346	42,361	32,172	37,036	362,164	67.1
Pack. & Ind. Conv. Paper	65,390	29,624	5,158	3,663	5,550	3,972	53,062	–17.0
Special Industrial Paper	62,645	72,956	4,912	9,671	6,275	10,406	60,504	–4.7
Tissue Paper	6,834	9,787	1,873	1,968	2,047	2,066	15,440	122.8
Paperboard, Total	362,701	149,356	33,240	21,020	32,594	20,460	380,215	4.3
Convtd Paper&Paperbd Products	328,653	266,143	26,790	48,179	26,596	42,341	307,776	–7.0
Wet Machine Board	1,628	660	0	0	0	0	0	–100.0
Construction Paper & Board	19,040	7,143	298	220	149	132	2,343	–87.6

SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

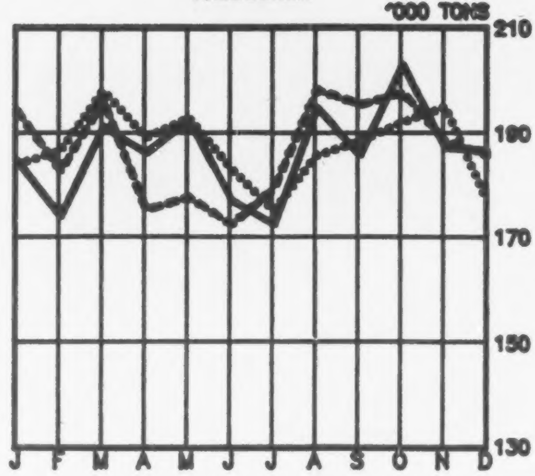
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



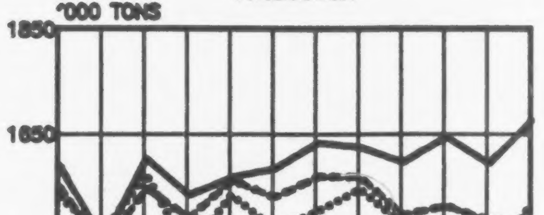
OTHER PAPER

PRODUCTION



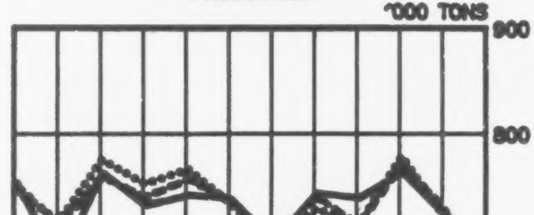
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



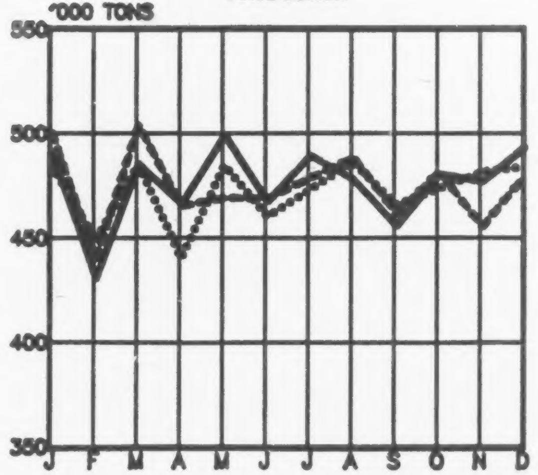
RECYCLED PAPERBOARD

PRODUCTION



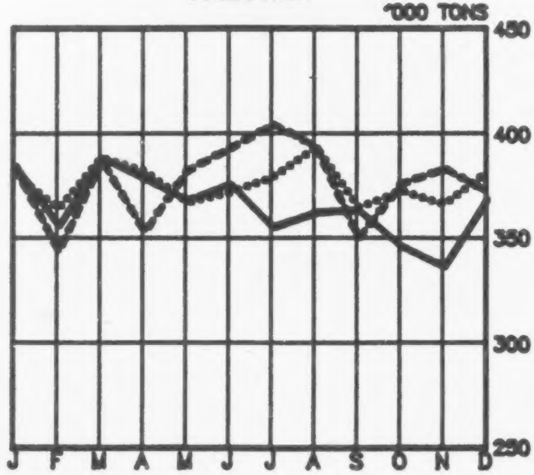
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1988 ········ 1989 ------1990 ———

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989		OCTOBER 1990		NOVEMBER 1990		Annual Rate YTD 1990	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)		211,081	4,582	0	0	0	0	0	-100.0
Pulpwood Chips		806,381	27,759	60,514	1,358	52,986	1,775	698,448	-16.3
Total All Imports	A	18,288,860	11,352,263	1,622,875	1,014,986	1,481,869	930,489	18,378,132	-0.1
Wood Pulp Total	A	5,006,100	2,880,642	445,312	246,529	389,685	210,448	4,979,169	-0.9
Waste Paper		172,575	33,197	6,910	2,179	9,721	2,337	128,320	-27.8
Other Fibrous Materials		11,254	8,518	1,400	1,029	1,082	664	13,042	16.1
Paper Board & Products Total	A	13,098,931	8,329,906	1,168,254	765,180	1,081,160	717,010	13,258,701	0.6
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	1,129,738	676,182	1,046,667	631,683	12,834,786	1.8
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,205	8,279,603	1,148,884	760,317	1,069,980	713,861	13,111,062	1.0
Paper & Paperboard Only	A	12,347,748	7,181,244	1,112,368	671,348	1,034,467	628,334	12,687,176	2.2
Paper Total	A	11,814,263	6,900,798	1,050,215	643,788	981,251	602,609	12,063,611	1.6
Newsprint	A	8,553,401	4,379,613	685,113	359,283	665,827	351,570	8,368,889	-2.5
Printing & Writing	A	2,732,978	1,996,141	308,252	225,007	269,464	200,452	3,129,462	13.1
Uncoated Groundwood		1,304,114	817,785	147,668	96,854	114,344	75,034	1,352,913	1.6
Coated Print.& Impreg. Pap.	A	774,022	632,484	81,021	63,516	71,950	69,194	950,049	21.[illegible]
Uncoated Free Sheet	A	583,077	462,404	73,378	67,702	76,172	57,946	747,448	28.8
Thin (except Cigarette)		12,711	15,200	1,268	1,389	1,000	1,373	11,364	-8.5
Bristols		59,052	68,267	4,899	5,567	6,019	6,903	67,700	14.5
Total Pkg & Other Paper		407,087	414,353	41,907	45,975	33,490	39,356	436,443	7.9
Unbleached Kraft Paper		239,303	116,011	24,557	12,695	17,988	9,067	243,443	2.3
Other Pkg. & Indust. Paper		167,785	298,342	17,350	33,280	15,502	30,258	193,000	15.8
Tissue		120,797	110,691	14,944	13,501	12,440	11,233	129,007	6.5
Paperboard, Total		533,486	280,446	62,153	27,582	53,216	25,725	623,564	15.2
Test or Containerboard		85,048	34,401	6,458	2,896	7,783	3,263	116,734	38.7
Semi-Chemical Corrugating		118,176	36,462	12,196	3,228	7,497	1,988	109,356	-8.6
Other Paperboard		330,262	209,584	43,499	23,024	37,936	20,477	397,475	17.8
Convtd Paper&Paperbd Products		562,457	1,098,259	36,516	84,989	35,523	85,327	423,906	-26.1
Paper Products, Total		470,471	924,729	26,536	70,202	26,654	67,436	318,508	-33.5
Paperboard Products, Total		91,986	173,529	9,980	18,787	8,869	17,891	105,398	11.8
Wet machine Board		606	580	31	33	143	123	1,218	96.1
Construction Paper & Board E		189,119	49,824	17,339	4,811	11,057	3,225	146,401	-25.7
Notes									
Other: No Weight Avail. ($000)			136,624		13,925		13,040	137,625	-1.6
Total Imports Incl. Other($000)			11,488,886		1,028,823		943,489	11,569,912	-0.1

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989		OCTOBER 1990		NOVEMBER 1990		Annual Rate YTD 1990	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	137,617	3,475	126,581	3,221	181,981	4,425	1,125,906	671.0
Pulpwood Chips	4,357,811	388,154	414,852	37,876	454,113	36,220	4,698,406	8.1
Total All Exports	18,633,605	8,603,945	1,658,693	777,094	1,578,065	715,413	19,378,228	4.2
Wood Pulp,Total	6,231,172	3,512,604	491,163	247,521	437,790	216,636	5,922,094	-3.9
Cotton Pulp and Other Pulp	122,045	100,510	10,732	7,831	10,397	7,797	137,389	15.7
Waste and Old Paper	5,980,620	729,797	579,253	66,502	582,808	64,210	6,476,578	7.9
Paper, Board & Products,Total	6,299,768	4,261,035	577,545	453,070	547,009	426,671	6,842,156	8.4
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,696	480,729	305,856	454,717	296,575	5,791,228	10.1
Paper, Ppbd & Prod ex Cnst&WMB	6,263,491	4,246,277	576,458	452,269	546,216	426,177	6,832,577	8.9
Paper & Paperboard, Only	5,223,466	2,967,928	479,642	305,048	453,924	296,061	5,781,648	10.8
Paper, Total	1,486,752	1,233,527	133,353	136,490	135,724	132,128	1,533,379	3.2
Newsprint	624,798	357,381	42,837	25,487	52,054	30,143	540,629	-16.0
Printing & Writing	478,201	465,168	62,367	71,621	52,578	58,252	674,405	40.7
Uncoated Groundwood	88,058	64,766	7,194	6,437	5,714	5,245	75,369	-15.0
Clay Coated Paper	168,538	131,418	22,511	22,382	15,827	16,061	225,219	34.1
Uncoated Free Sheet	122,348	166,830	20,350	30,859	19,582	26,922	233,210	92.8
Other Printing & Writing	99,260	102,164	12,312	11,843	11,456	10,024	140,587	38.2
Total Pkg. & Other Paper	342,041	380,790	24,675	35,265	27,249	39,368	284,841	-16.8
Unbleached Kraft	125,818	60,318	9,688	5,482	10,338	5,542	112,012	-9.1
Other Pkg. & Indust. Paper	216,223	320,472	14,987	29,783	16,910	33,826	172,829	-21.1
Tissue	20,712	30,187	3,474	4,115	3,843	4,365	33,504	58.2
Paperboard, Total	3,757,704	1,734,402	346,289	168,557	318,201	163,953	4,248,269	13.8
Solid Wood Pulp	3,572,758	1,646,152	328,552	158,906	299,085	143,856	4,016,479	13.1
Total Linerboard	2,499,716	935,364	238,624	87,610	211,635	78,699	2,937,799	18.4
Bleached Kraft Linerboard	283,113	127,787	36,098	16,016	38,019	17,222	333,578	16.8
Unbleached Kraft Linerbd	2,216,603	807,578	202,526	71,594	173,616	61,477	2,604,222	18.2
Other Unbleached Kraft	246,575	113,315	15,779	9,152	19,156	11,454	251,552	-0.1
Other Bleached Kraft	795,306	582,979	70,056	60,396	64,051	62,250	777,333	-1.1
Semi-Chemical Corrugating	31,162	14,494	4,093	1,448	4,244	1,453	49,798	61.5
Recycled Paperboard	184,947	88,250	17,737	8,951	19,116	10,097	231,790	22.5
Convtd Paper&Paperbd Products	1,040,035	1,278,349	96,816	147,223	92,292	140,096	1,050,929	0.1
Paper Products, Total	473,435	832,806	40,581	82,721	40,334	89,934	439,217	-8.0
Paperboard Products, Total	566,601	445,543	56,234	64,502	51,958	50,162	611,711	7.0
Wet Machine Board	2,889	1,256	12	5	11	16	531	-82.3
Construction Paper & Board E	33,388	13,501	1,074	806	782	476	9,049	-72.4
Notes								
Other: No Weight Avail. ($000)		23,865		4,726		4,776	50,805	112.9
Total Exports Incl. Other($000)		8,627,611		781,820		720,188	9,191,911	6.8

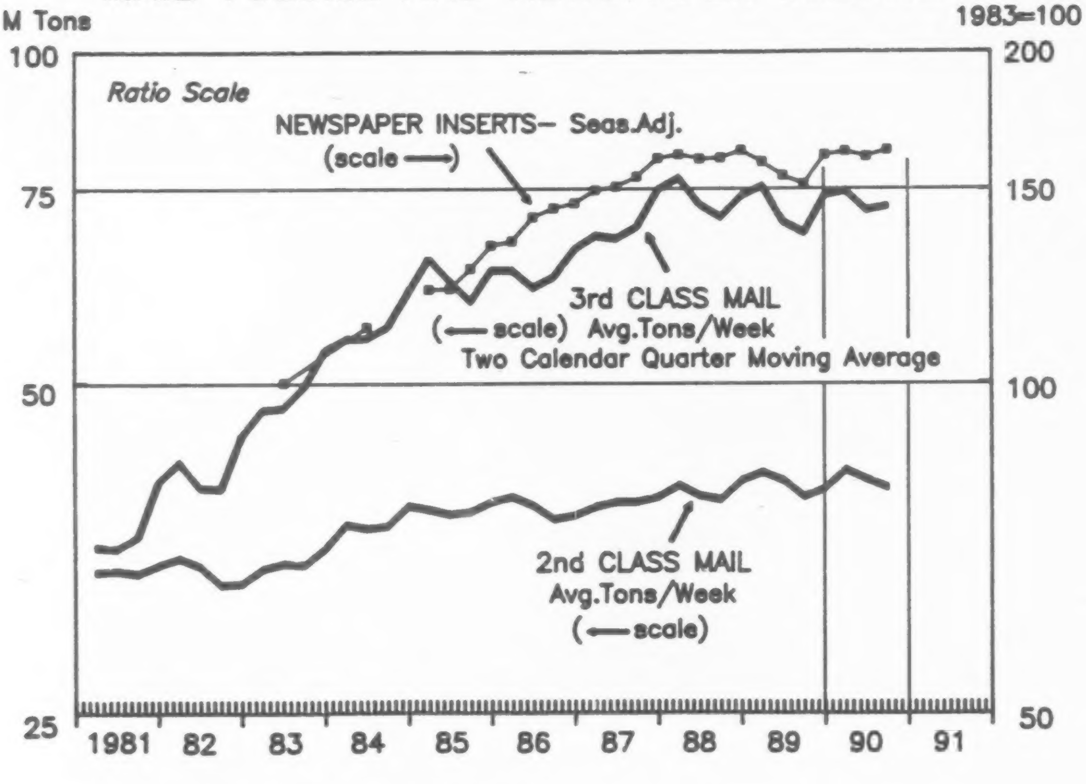
SOURCE: Bureau of Census, U.S. Department of Commerce. E – incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		SEPT	OCT	NOV	DEC	Annual Rate Y-T-D	% Change from same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
Pulp, Paper and Products except Building Grades	124.8	132.4	132.6	132.9	133.0	132.9	133.0	0.4
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	123.8	132.0	132.6	132.9	133.1	132.9	132.9	0.7
Total Wood Pulp	136.7	157.4	150.1	147.3	145.7	144.7	152.4	–3.2
Total Paper	123.2	129.6	129.8	130.2	130.2	129.9	128.8	–0.6
Writing Paper, exc. Newsprint	123.4	130.5	130.3	130.6	130.7	130.1	129.2	–1.0
Newsprint	127.6	122.5	121.8	122.0	122.2	122.2	119.5	–2.4
Total Paperboard	133.2	140.1	133.1	133.9	135.0	133.9	135.9	–3.0
Total Paper and Paperboard *	126.4	132.9	130.8	131.4	131.7	131.2	131.0	–1.4
Converted Products	123.0	131.7	135.2	135.7	135.8	135.9	135.2	2.7
Waste Paper	183.6	157.1	130.0	130.0	129.0	131.4	138.2	–12.0
All Commodities	106.9	112.2	118.3	120.8	120.1	118.6	116.3	3.6
Industrial Commodities	106.3	111.6	118.3	121.3	120.6	118.9	115.8	3.7

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

MAIL VOLUME AND NEWSPAPER INSERTS



Source: API Newsprint Division

Though up sharply from the low of 4.8 weeks of supply reported for the end of October 1990, they were only one-tenth of a day higher than at the end of 1989.

Total boxboard production in 1990 was 1.1% below its 1989 level, reflecting a similar decline in production of folding boxboard and a 2.7% drop in the "all other" paperboard grades, largely the result of an 11% decline in production of gypsum wallboard facing. There was a major shift from the solid bleached to the recycled grades within the folding boxboard sector (see table on page 3), while the grade total was supported by strength in exports.

FIBROUS RAW MATERIALS

Production of chemical paper grade market pulp rose 3.8% in 1990 to a high of 7,520,000 tons. Output strengthened in the late months of the year, with the second half total 8.9% over the corresponding 1989 figure.

Shipments followed a similar pattern, rising 3.2% from the 1989 level to 7,388,000 tons, with 132,000 tons diverted to mill inventories. The second-half 1990 total was 9.6% above the corresponding 1989 level, reflecting increases in exports.

Exports of chemical paper grade market pulp in 1990, at 4.8 million short tons, were 6.7% above their year-ago total. Exports to Western Europe, which accounted for 41% of the total, gained 8.9%, while exports to Latin America, which amounted to 9% of the total, increased 40%. Exports to Japan (19% of the total) declined 16%, but exports to other Asian and African nations gained 11%, taking some 25% of the total.

Shipments to the domestic market and imports lagged this trend, falling 2.7% and an estimated 6.9%, respectively, as consumers' inventories of purchased wood pulp declined.

Waste paper continues to gain in importance as a source of fibre at paper and paperboard mills. Consumption in the January - November period rose 8.4% from its year-earlier level, outpacing the 1.6% increase in wood pulp usage.

COMMERCIAL PRINTING MARKETS

Inflation-adjusted shipments by commercial printers expanded 3.0% in 1990, following gains of 4.7% in 1989 and 4.2% in 1988, according to the Commerce Department. Last year's slowdown reflected weakness in financial printing and magazine advertising pages, which were off an estimated 8-10%. Other product categories encompassed by the Commerce Department's commercial printing series include catalogs and directories, labels and wrappers, newspaper inserts plus miscellaneous products such as tickets, menus, etc. Some 60% of commercial printing output was advertising-related.

Newspaper inserts and direct mail advertising were areas of relative strength for commercial printers during 1990. Newspaper inserts, based on a sample drawn from four major publishing firms, rose an estimated 4-5% in 1990.

Third class mail volume, a proxy for direct mail advertising, was up about 3% through the first nine months of last year and will probably maintain that gain for 1990 as a whole. However, if past experience is a reliable guide, third class mail volume will lose ground for several months after the February 3, 1991 rate hikes. As is shown by the graph on page 10, third class mail volume declined following the rate hikes imposed in February 1985 and April 1988.

The commercial printing industry's regional profile has changed significantly during the past twenty years. The West saw its share of national commercial printing output expand from 8.5% in 1970 to 18% in 1990, while the South's share rose from 21% to 27%. On the other hand, the Northeast experienced a contraction in market share from 41% to 24%. The North Central's relative importance has remained approximately stable at 30%.

The following table, which appears in the 1991 U.S. Industrial Outlook, lists the major products produced by commercial printers, along with their respective dollars volumes, highlighting the relative importance of these various markets.

ESTIMATED SALES OF PRINTED PRODUCTS

	Estimated 1990 Sales	
Printed Products	Billion Dollars	Per Cent
TOTAL	55.0	100.0
Advertising	19.0	34.5
Magazines and periodicals	8.0	14.5
Catalogs and directories	7.0	12.7
Labels and wrappers	5.0	9.1
Financial and legal	3.0	5.5
All other printed products	13.0	23.6

Source: U.S. Department of Commerce, International Trade Administration; Percentage calculations, API.

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 1
JANUARY, 1991

PRODUCTION (000 TONS)

	(P) DEC 1990	(R) NOV 1990	DEC 1989	FIRST 12 MONTHS 1990	1989	% CHANGE YR TO DATE 1990/1989
PAPER GRADES						
Newsprint	576	564	532	6,615	6,088	8.7
Printing & Writing	1,763	1,865	1,688	22,381	21,626	3.5
Uncoated Groundwood (s)	147	151	122	1,768	1,743	1.4
Coated Groundwood (s)	327	369	341	4,214	4,059	3.8
Coated Free Sheet (s)	237	273	246	3,307	3,157	4.8
Total Coated Paper (s)	564	642	587	7,521	7,215	4.2
Uncoated Free Sheet Paper (s)	930	942	865	11,510	11,081	3.9
Thin Paper (s)	14	19	19	234	262	-10.8
Cotton Fiber Paper (s)	11	13	12	161	161	0.2
Bleached Bristols (s)	96	98	84	1,188	1,164	2.0
Tissue Paper	484	477	460	5,802	5,636	2.9
Total Pkg & Other Paper	359	383	394	4,611	4,916	-6.2
Unbl. Kraft Paper (s)	173	196	216	2,377	2,681	-11.4
Other Paper	187	187	178	2,235	2,235	0.0
TOTAL PAPER	3,183	3,290	3,074	39,410	38,266	3.0
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,795	1,698	1,569	20,335	19,490	4.3
Unbleached Kraft Linerboard	1,677	1,593	1,477	19,082	18,196	4.9
Other Unbl. Kraft Paperboard	118	106	92	1,253	1,294	-3.2
Semichemical Paperboard	494	477	480	5,710	5,691	0.3
Bleached Paperboard	369	336	372	4,380	4,521	-3.1
Recycled Paperboard	663	723	652	8,731	8,754	-0.3
TOTAL PAPERBOARD	3,321	3,234	3,073	39,156	38,456	1.8
TOTAL PAPER AND PAPERBOARD	6,504	6,524	6,147	78,566	76,722	2.4

WOOD PULP (ALL GRADES)	NOV 1990	OCT 1990	NOV 1989	FIRST 11 MONTHS 1990	1989	% CHANGE YR TO DATE 1990/1989
Dissolving & Special Alpha	71	91	133	1,170	1,308	-10.6
Bleached Sulfite)	126	133	124	1,434	1,441	-0.5
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,225	2,334	2,152	25,192	24,841	1.4
Unbleached Sulfate	1,824	1,943	1,756	20,297	19,904	2.0
Semichemical	353	362	351	3,934	4,006	-1.8
Groundwood & Thermomechanical	550	578	505	5,906	5,506	7.3
TOTAL PULP DIVISION DATA	5,150	5,442	5,021	57,932	57,007	1.6

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA January 31, 1991	1988	1989	1990	1990 R	1990 P	AN RATE Y-T-D 90	% CH/ SAME PD 89
PAPER AND PAPERBOARD -- Tons (000)			OCTOBER	NOVEMBER	DECEMBER		
Total Production (API)......: excluding :......	76,455	76,722	6,828	6,524	6,504	78,566	2.4
Total Seasonally Adjusted......: construction :......			6,664	6,628	6,591	78,507	2.4
Imports (Including Products)......: and wet :......E......	12,786	12,910	1,149	1,070	1,089	13,087	1.4
Exports (Including Products)......: machine :......E......	5,559	6,263	576	546	567	6,831	9.1
Apparent Consumption......: grades :......	83,683	83,369	7,237	7,151	7,093	84,823	1.8
Paper Production % Tonnage Capacity......	95.4	93.0	96.1	93.8	88.2	93.4	-
Paperboard Production % Tonnage Capacity......	94.5	93.8	92.6	92.3	92.1	93.6	-
PAPER, PAPERBOARD AND PRODUCTS			SEPTEMBER	OCTOBER	NOVEMBER		
Imports.....:Including Construction and :......	13,110	13,100	1,004	1,166	1,061	13,259	0.6
Exports.....: WMB Grades (excl. HPB) :......	5,891	6,300	580	578	547	6,842	8.4
MARKET WOOD PULP PRODUCTION - Tons (000)......	8,565	8,864	734	728	674	8,817	0.8
TOTAL WOOD PULP PRODUCTION - Tons (000)......	61,161 f	61,998 f	5,200	5,442	5,150	63,205	1.8
WOOD PULP IMPORTS - TONS (000)......	5,038	5,005	367	445	390	4,979	-0.9
WOOD PULP EXPORTS - TONS (000)......	5,528	6,231	526	401	436	5,922	-3.9
RAW MATERIALS CONSUMPTION - Tons (000)			SEPTEMBER	OCTOBER	NOVEMBER		
PAPER AND BOARD MILLS....: excluding :......							
Wood Pulp......: consumption for :......	60,294	60,727	5,034	5,391	5,073	61,840	1.6
Waste Paper......: construction & :......	19,021	19,490	1,797	1,834	1,790	21,212	8.4
TOTAL......: WMB grades :......	79,315	80,217	6,831	7,225	6,862	83,052	3.3
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	95,497	98,414	8,328	8,517	8,120	99,471	0.8
EMPLOYMENT (000)			OCTOBER	NOVEMBER	DECEMBER		
Paper and Allied Products......Total......	692.6	697.1 RS	696.9	696.3	695.7	698.5	0.2
Pulp, Paper and Board Mills......Total......A......	247.2	229.6 RS	227.3	227.2	227.6	229.3	-0.1
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			OCTOBER	NOVEMBER	DECEMBER		
Paper and Allied Products......	11.66	11.96 RS	12.43	12.53	12.53	12.30	2.8
Pulp, Paper Mills......A......	14.31	14.73 RS	15.44	15.58	15.41	15.20	3.2
Paperboard Mills......E......	14.49	14.76 RS	15.58	15.75	15.69	15.25	3.4
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q1	1990 Q2	1990 Q3		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	10.92	15.58	17.56	18.59	16.74	16.84 Y	8.1
INDEX OF OUTPUT PER MAN-HOUR (1977=100)			OCTOBER	NOVEMBER	DECEMBER		
:IN PULP, PAPER :...Production Workers......	146.0	148.0 RS	152.1	149.4	150.5	150.5	1.7
:AND BOARD MILLS:...All Employees......	142.8	144.7 RS	149.3	146.7	147.1	147.1	1.7
PAPER AND ALLIED PRODUCTS (Million $)			OCTOBER	NOVEMBER	DECEMBER		
Industry Shipments (Dept. of Commerce)*......	127,718	130,501	10,966	10,992	10,827	131,215	0.5
Pulp, Paper and Paperboard*......	57,177	57,700	4,753	4,727	4,677	56,425	-2.2
Inventories (End of Period) - Total Industry*......	12,065	12,571	12,769	12,787	12,904	12,904	2.6
Pulp, Paper and Paperboard*......	4,325	4,960	5,205	5,233	5,258	5,258	5.6
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q1	1990 Q2	1990 Q3		
Sales (Corporations Only)......	107,221	113,573	28,534	28,844	28,862	114,987	1.6
Earnings (Corporations Only)......	8,061	7,047	1,369	1,630	1,246	5,887	-27.6
Depreciation (Corporations Only)......	4,625	5,010	1,347	1,341	1,380	5,424	9.7
Net Worth (Corporations Only)......	42,940	45,642	48,519	45,597	46,185	46,185	-0.1
PRICE INDEXES (Bureau of Labor Stats)1982=100			OCTOBER	NOVEMBER	DECEMBER		
Pulp, Paper & Products, ex. Building Grades......	124.8	132.4	132.6	132.9	133.0	133.0	0.4
Wood Pulp......	136.7	157.4	150.1	147.3	145.7	152.4	-3.2
Waste Paper......	183.6	157.1	130.0	130.0	129.0	138.2	-12.0
Paper......	123.2	129.6	129.8	130.2	130.2	128.8	-0.6
Paperboard......	133.2	140.1	133.1	133.9	135.0	135.9	-3.0
PAPER DEMAND (INDEXED: 1987=100)			OCTOBER	NOVEMBER	DECEMBER		
Total Paper Production *......	103.8	103.5	109.2	107.4	103.9	106.7	3.0
Paper New Supply *......	103.7	102.2	107.7	104.4	101.6	104.7	2.4
Demand Indicators - (Weighted Average) *......	103.8	107.8	110.3	110.1	110.2	110.1	2.1
Production of Nondurable Goods......*....(21.2%)......	103.6	106.4	108.2	107.1	106.9	107.7	1.2
Disposable Income......*....(23.9%)......	104.4	107.2	107.0	107.1	107.7	108.1	1.5
Total Printing and Publishing......*....(54.9%)......	103.6	108.6	112.6	112.5	112.5	111.9	3.1
PAPERBOARD DEMAND (INDEXED: 1987=100)			OCTOBER	NOVEMBER	DECEMBER		
Total Paperboard Production *......	101.7	102.6	105.9	106.5	108.8	104.5	1.8
Production for Domestic Use	102.0	102.7	106.4	107.6	106.0	103.7	0.9
Demand Indicators - (Weighted Average) *......	104.7	107.2	108.8	106.6	106.2	107.9	0.6
Production of Consumer Goods......*....(62.06%)......	104.0	106.6	108.4	106.1	106.1	107.3	0.6
Production of Equipment......*....(5.75%)......	107.5	112.3	117.0	114.8	114.2	115.5	2.9
Production of Materials......*....(32.19%)......	105.6	107.4	108.2	106.0	104.9	107.7	0.3
MARKET DATA			SEPTEMBER	OCTOBER	NOVEMBER		
Consumption by Publishers - Tons (000)......	13,497	13,493	1,122	1,154	1,136	13,372	-0.8
Newspaper Pub. and Printing Empl. Total(000)......	475	473	479	479	478	478	1.1
Magazine Advertising Pages (PIB, Inc.)	172,580	181,560	16,409	17,744	16,917	172,426	-5.0
Wholesalers Sales and Inventories (Million $)			SEPTEMBER	OCTOBER	NOVEMBER		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales......	46,554	50,740	4,307	4,880	4,502	52,947	4.2
Inventories (End of Period)......	3,959	4,137	4,161	4,395	4,407	4,407	7.3
FIBRE BOX DATA (Fibre Box Association)			OCTOBER	NOVEMBER	DECEMBER		
Fibre Box Shipments (Million square feet)......	306,507	313,400	30,5[illegible]6	24,965	21,412	315,775	0.8
Containerbd Inventory at Mill & Plant (000 Tons)......	2,553	2,589	2,485	2,526	2,784	2,784	7.5
RETAIL TRADE (Billion $)							
Total Retail Sales *......	1,622	1,711	151.8	151.6	151.1	1,801	5.3
Nondurable Goods Stores Sales *......	995	1,062	97.7	98.2	98.0	1,152	8.5
GENERAL ECONOMIC DATA			OCTOBER	NOVEMBER	DECEMBER		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*......	105.4	108.1	109.8	107.8	107.1	109.1	1.0
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)......	106.9	112.2	120.8	120.1	118.6	116.3	3.6
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)......	118.3	124.0	133.5	133.8	133.8	130.7	5.4
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q1	1990 Q2	1990 Q3		
G.N.P. or Expenditure - Current $......	4,874	5,201	5,375	5,443	5,515	5,463	5.0
G.N.P. or Expenditure - 1982 $......	4,017	4,118	4,151	4,155	4,170	4,156	0.9
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	680	670				680	

f - Wood Pulp Prod exc def., explo & scr. R - Revised RS - Revised series E - Last month estimated by API A - Estimated by API Y - Full year estimated by Dep't of Commerce * Seasonally Adjusted

A2500-2

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.2 FEBRUARY 1991

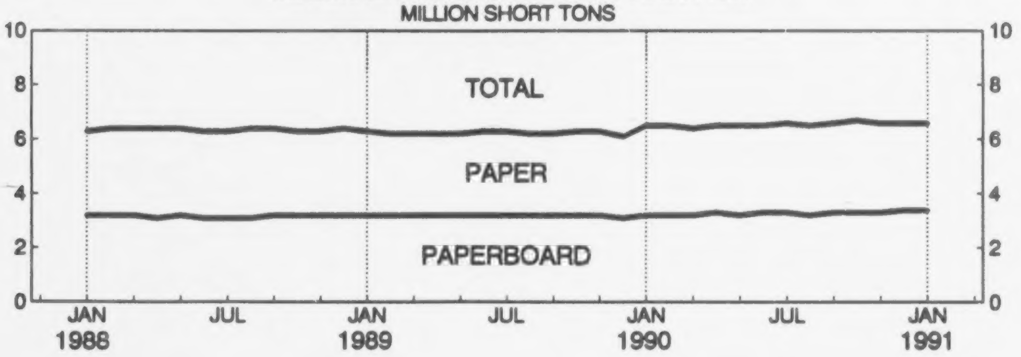
PAPER AND PAPERBOARD: JANUARY 1991
SHIPMENTS DECLINE

Production of paper and paperboard moved 1.8% above year-ago levels in January 1991, but shipments declined as some of this production moved into inventory.

Most of the reported paper data refer to shipments; total paper output in January 1991 was 0.9% below its January 1990 total. Paperboard production gained 4.5% from January 1990 to January 1991. After the increase in inventories of containerboard at mills and corrugated box plants is taken into account, the effective shipments total is below its corresponding 1990 figure.

The table below pictures the seasonally-adjusted trends of paper, paperboard and total paper and paperboard production for the period January 1988 through January 1991.

PAPER AND PAPERBOARD PRODUCTION
SEASONALLY ADJUSTED - JAN 1988 TO JAN 1991
MILLION SHORT TONS



Paper: The year-to-year decline in paper output in January 1991 was largely concentrated in the printing-writing grades. Total shipments of these papers were down 3.2%. Shipments of groundwood papers fell 7.7%, coated papers, 3.0% and uncoated free sheet papers, 1.9%. New orders for coated papers and uncoated free sheet papers in January 1991 were less than shipments, and the backlog of unfilled orders declined to

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Some of the major printing-writing paper markets are feeling the impact of the current recession. For most types of magazines, for example, advertising pages were well below year-ago levels in January 1991. In fact, print advertising generally, which increased through the first half of 1990, has since been in a declining trend. Sales by stationery wholesalers have been decreasing; their average inventory/sales ratio moved up from 1.0 months of supply in mid-1990 to 1.2 months by the year-end. The inventory-sales ratio at printing-paper wholesalers, at 0.8 months of supply, is about where it was one year ago.

On a more general level, net new business formation was in a "free-fall" trend throughout 1990. Firms going out of business represent lost paper markets, while the reduction in new business formation decreases paper's growth potential.

The recent increase in postal rates is affecting direct mail advertising. The previous increase, in April 1988, triggered a decline in second and third class postal revenue that lasted until the end of 1989, a time when the economy was still expanding. Mailings moved up throughout most of 1990, but now appear to be flattening. Newspaper inserts increased during the first three quarters of 1990, but turned down in the fourth quarter.

Among the other papers, newsprint production continues to show strength. The January 1991 total of 580,000 tons represented a new high, 4.7% above its year-ago level. The gain can be traced to the effects of the new machines and the strength of newsprint demand in the southern and western regions where these machines are sited.

Production of tissue papers, which is generally less affected by the business cycle than are the other paper grades, rose 2.5% over its January 1990 level in the first month of this year. Specialty packaging papers and special industrial papers also increased, but kraft paper shipments continued to decline.

Paperboard: Paperboard production was 4.5% above its January 1990 total in January 1991, reflecting a 6% rise in containerboard production combined with a 1.1% increase in boxboard. Production of paperboard for export was up 3.7%, accounting for 8% of the total gain in production. The major source of the January 1990-1991 increase was the 284,000 tons added to mill and corrugated boxplant inventories. Production of containerboard for domestic use at fibre box plants advanced 6.4%; without the inventory gain, the production total would have been 8% below that of January 1990. Shipments of fibre boxes in January 1991 were 1.4% below their January 1990 total.

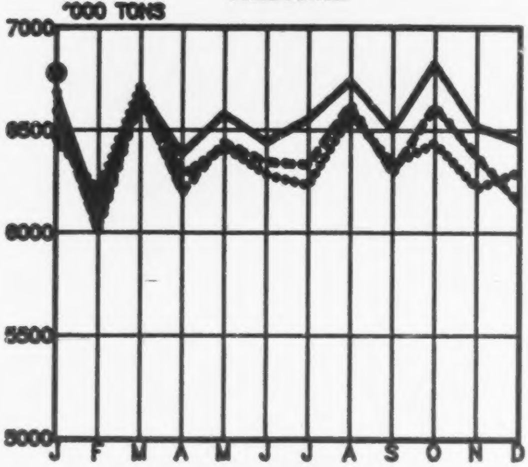
Total boxboard production advanced 1% in this period, reflecting a 6% increase in boxboard for packaging for domestic use and a 3% gain in boxboard production for export -- mainly bleached kraft

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR 1989	YEAR 1990	OCT 1990	NOV 1990	DEC (R) 1990	JAN (P) 1991	Annual Rate Y-T-D 1991	% Change From Same Period Last Year
PAPER								
Newsprint – Production	6,088	6,615	563	564	576	580	6,954	4.7
– Shipments	6,079	6,628	557	564	576	580	6,960	5.8
Printing & Writing: Total Shipments	21,626	22,381	2,003	1,865	1,763	1,883	22,598	-3.2
Groundwood Paper – Shipments	1,743	1,768	168	151	147	144	1,724	-7.7
– New Orders	1,741	1,834	163	136	161	170	2,039	6.5
– Unfilled Orders	193	168	222	213	215	236	236	40.6
Coated Groundwood – Shipments	4,059	4,214	387	369	327	348	4,178	-3.3
Coated Free Sheet – Shipments	3,157	3,307	302	273	237	281	3,374	-2.7
Total Coated Papers – Shipments	7,215	7,521	689	642	564	629	7,551	-3.0
– New Orders	7,171	7,423	671	589	531	590	7,082	-3.5
– Unfilled Orders	706	646	693	643	591	572	572	-11.5
Unctd Free Sheet -- Shipments	11,081	11,510	1,009	942	930	981	11,767	-1.9
– New Orders	11,097	11,499	996	888	862	911	10,931	-2.8
– Unfilled Orders	748	653	818	778	665	634	634	-2.9
Thin Papers – Shipments	262	234	20	19	14	20	236	-19.2
Cotton Fiber Paper – Shipments	161	161	14	13	11	13	154	-5.7
Bleached Bristols – Shipments	1,164	1,188	102	98	96	97	1,167	-6.0
Tissue Paper – Production	5,636	5,802	507	477	484	485	5,825	2.5
Total Packaging & Other Paper	4,916	4,613	411	387	357	394	4,729	-1.4
Unbl. Kraft Paper – Shipments	2,681	2,377	208	196	173	202	2,424	-6.1
Bl. Kraft Paper – Shipments	468	484	44	41	37	35	422	-18.1
Specialty Pkg. Paper – Production	520	563	51	52	51	50	600	9.0
Special Industrial Paper – Shipments	1,248	1,190	108	99	97	107	1,283	11.6
TOTAL PAPER PRODUCTION – UNADJUSTED	38,266	39,411	3,484	3,294	3,181	3,342	40,107	-0.9
TOTAL PAPER PRODUCTION – SEAS ADJ			3,360	3,308	3,195	3,257	39,079	-0.9
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,265	2,342	2,281	2,376	2,422	29,056	6.0
Cont'bd For Dom Use for Fibre Boxes	23,752	24,320	2,125	2,079	2,066	2,154	25,847	6.4
Total Linerboard	16,399	16,870	1,499	1,453	1,426	1,504	18,046	8.4
Unbleached Kraft	15,833	16,404	1,455	1,405	1,388	1,454	17,448	7.7
Solid Bleached	178	132	11	11	10	12	148	-2.4
Recycled	388	334	32	38	29	38	450	49.4
Corrugating Medium	7,339	7,443	626	625	640	650	7,796	2.0
Semichemical	5,554	5,566	469	469	480	487	5,839	1.9
Recycled	1,785	1,877	157	156	160	163	1,957	2.4
Container Chip and Filler	14	7	1	1	0	0	5	-55.6
Other Containerboard for Dom Use	307	282	25	17	24	23	271	-3.4
Containerboard for Export	2,369	2,662	191	185	285	245	2,940	3.9
Boxboard	12,029	11,891	1,002	954	945	1,041	12,486	1.1
Boxboard for Packaging for Dom Use	7,076	6,975	581	571	575	640	7,679	6.2
Folding Boxboard	5,370	5,239	449	440	446	481	5,770	5.6
Solid Bleached	1,980	1,827	143	139	159	167	2,003	2.5
Unbleached Kraft	987	970	84	89	94	92	1,106	18.2
Recycled	2,403	2,442	221	213	193	222	2,660	3.5
Set-up Boxboard for Dom Use	288	297	23	23	19	23	281	-13.0
Milk Carton & Food Service Dom Use	1,419	1,439	109	108	111	136	1,628	12.7
Other Boxboard for Domestic Use	4,089	3,971	345	313	235	317	3,808	-8.1
Boxboard for Export	863	946	77	69	85	83	1,000	3.0
Paperboard Production by Furnish	38,456	39,156	3,344	3,234	3,321	3,462	41,533	4.5
Unbleached Kraft	19,490	20,335	1,754	1,698	1,795	1,823	21,869	8.0
Semichemical	5,691	5,710	480	477	494	497	5,959	1.5
Solid Bleached Kraft	4,521	4,380	346	336	369	393	4,710	2.3
Recycled	8,754	8,731	764	723	663	750	8,995	-0.4
Paperboard Production for Export	3,232	3,608	268	254	370	328	3,940	3.7
Unbleached Kraft	2,363	2,678	189	188	289	254	3,052	7.7
Semichemical	138	143	12	8	14	10	119	-15.8
Bleached Kraft	693	734	63	56	64	58	693	-10.0
Recycled	38	52	4	3	3	6	76	42.1
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,456	39,156	3,344	3,234	3,321	3,462	41,544	4.5
TOTAL PAPERBOARD PROD – SEAS ADJ			3,304	3,324	3,395	3,350	40,201	4.5
APER AND PAPERBOARD – UNADJ	76,722	78,568	6,828	6,528	6,502	6,804	81,651	1.8
APER AND PAPERBOARD – SEAS ADJ			6,664	6,632	6,589	6,607	79,281	1.8

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

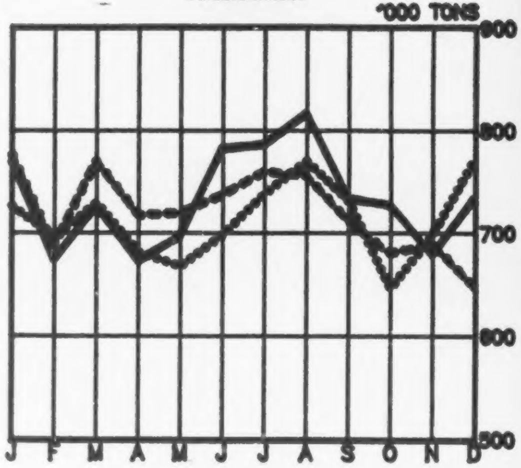
TOTAL PAPER AND PAPERBOARD

PRODUCTION



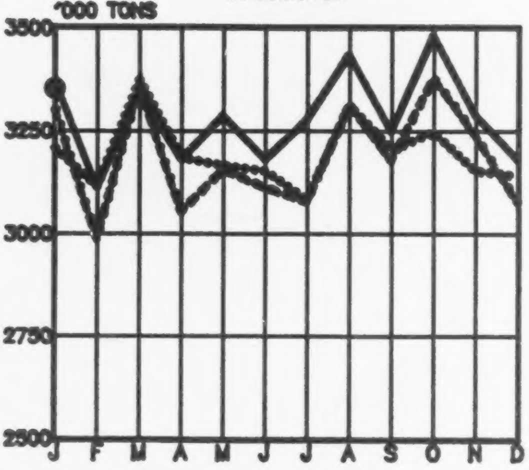
MARKET WOOD PULP

PRODUCTION



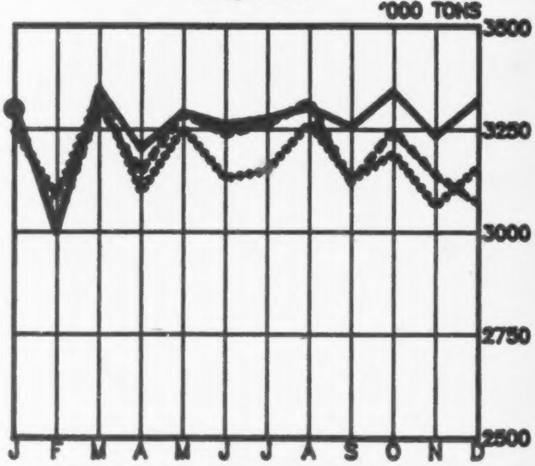
TOTAL PAPER

PRODUCTION



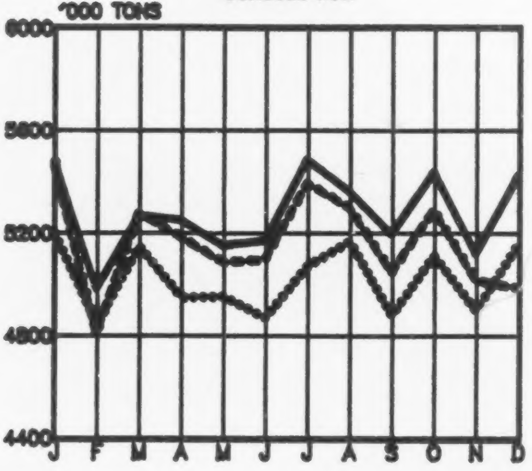
TOTAL PAPERBOARD

PRODUCTION



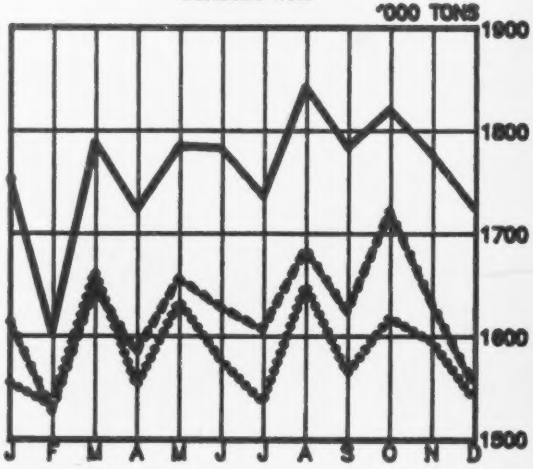
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1988 ········ 1989 ━ ━ ━ 1990 ━━━━ 1991 ●

WOOD PULP STATISTICS (Thousands of Tons)		YEAR		SEPT	OCT	NOV (R)	DEC (P)	Annual Rate Y-T-D	% Change From Same Period
		1988	1989	1990	1990	1990	1990	1990	Last Year
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,161	61,998	5,200	5,442	5,125	5,428	63,275	2.1
	Imports A	5,038	5,005	367	445	390	329	4,893	-2.2
	Exports	5,528	6,231	526	491	438	477	5,905	-5.2
	New Supply	60,671	60,772	5,042	5,396	5,077	5,280	62,363	2.6
Dissolving Pulp	Production	1,367	1,425	126	91	71	123	1,293	-9.3
	Imports	248	284	18	21	20	23	222	-21.9
	Exports	865	836	77	56	57	68	782	-6.5
	New Supply	751	873	66	56	34	77	733	-16.0
Paper Grades Chemical Pulp	Production	49,493	50,181	4,190	4,410	4,165	4,392	51,310	2.2
	Imports A	4,419	4,370	318	392	348	293	4,326	-1.0
	Exports	4,612	5,325	446	433	378	404	5,080	-4.6
	New Supply	49,300	49,226	4,062	4,369	4,135	4,280	50,556	2.7
Groundwood and Thermo-Mech	Production	5,943	6,029	536	578	543	554	6,452	7.0
	Imports A	371	351	31	32	22	14	345	-1.5
	Exports	51	70	3	2	3	4	44	-37.5
	New Supply	6,263	6,309	564	609	562	563	6,754	7.1
Semi-Chemical	Production	4,358	4,363	349	362	347	359	4,219	-3.3
	Imports								
	Exports								
	New Supply	4,358	4,363	349	362	347	359	4,219	-3.3
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,565	8,664	734	728	680	735	8,823	1.8
	Imports	3,557	3,539	250	293	257	226	3,215	-9.2
	Exports	5,071	5,309	527	447	416	530	5,576	5.0
	New Supply	7,051	6,893	457	574	522	431	6,461	-6.3
Dissolving Pulp	Production	1,365	1,422	125	91	74	123	1,298	-8.7
	Imports	206	210	18	16	17	16	170	-19.2
	Exports	798	821	80	55	52	85	789	-3.9
	New Supply	774	810	63	53	38	55	678	-16.3
Paper Grades Chemical Pulp	Production	7,200	7,242	607	635	607	612	7,518	3.8
	Imports	3,126	3,072	212	259	225	197	2,813	-8.4
	Exports	4,273	4,489	447	393	364	446	4,788	6.7
	New Supply	6,052	5,825	372	501	468	363	5,543	-4.9
Groundwood Pulp and All Other	Production	0	(0)	2	2	(0)	0	8	N.M.
	Imports RS	231	258	20	18	16	13	232	-9.8
	Exports	0	(0)	0	0	0	0	0	0.0
	New Supply	231	258	21	20	15	13	240	-6.7

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR		SEPT	OCT	NOV (R)	DEC (P)	Annual Rate	% Change From Same Period
	1988	1989	1990	1990	1990	1990	1990	Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,217	6,820	7,213	6,828	6,896	82,873	3.3
Total Wood Pulp	60,294	60,727	5,034	5,391	5,050	5,170	61,834	1.8
Waste Paper	19,021	19,490	1,785	1,822	1,778	1,726	21,039	7.9
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	193	228	210	201	229	229	18.9
Producers' Market Inventories	261	342	461	472	498	467	467	36.6
Consumers' Purchased Inventories #	622	519	423	422	358	392	392	-24.4
Waste Paper at Paper & Bd. Mills	1,044	1,082	976	1,026	997	928	928	-14.3
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	14	19	22	22	24	23	23	21.1

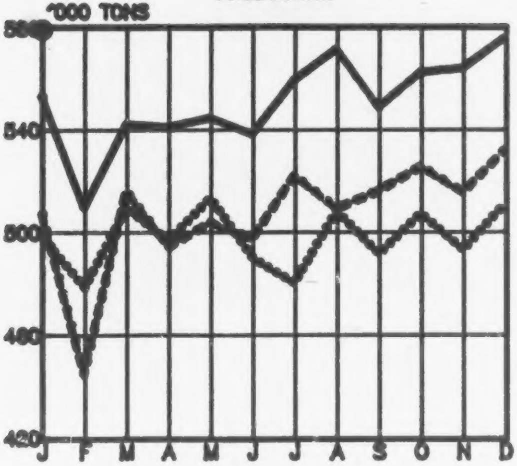
SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API.

Includes all grades of wood pulp N.M. – Not Meaningful

P – Preliminary; R – Revised; (0) – Indicates zero to five-hundred short tons

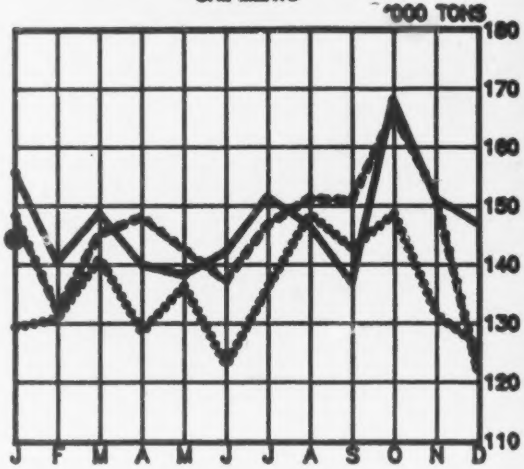
NEWSPRINT

PRODUCTION



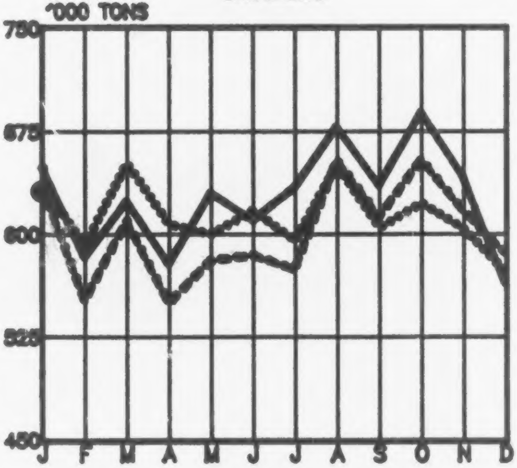
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



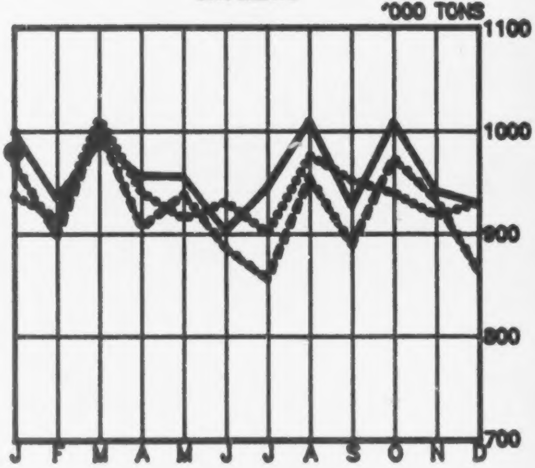
COATED PAPER

SHIPMENTS



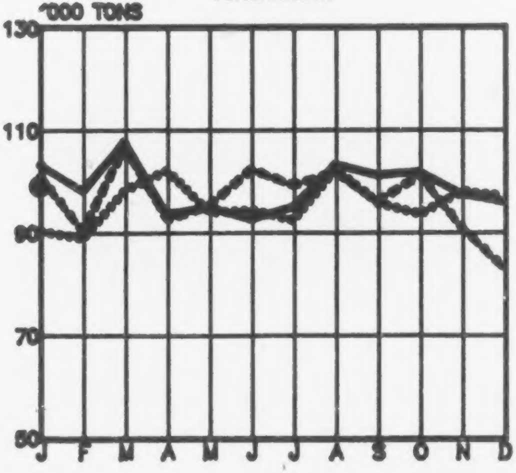
UNCOATED FREE SHEET PAPERS

SHIPMENTS



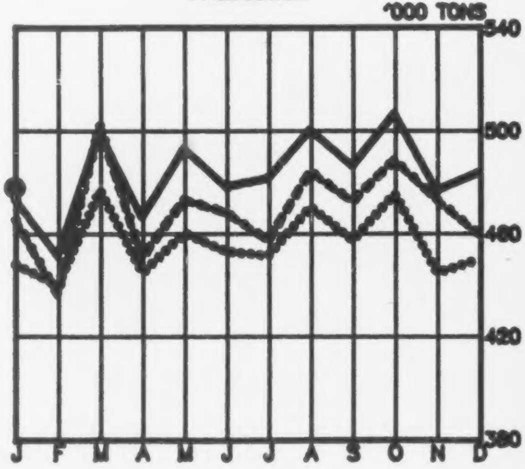
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1988 •••••••• 1989 ▬▬▬▬ 1990 ──── 1991 ●

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1988	YEAR 1989	SEPT 1990	OCTOBER 1990	NOVEMBER 1990	DECEMBER 1990	ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	96,537	99,279	8,271	8,712	8,180	7,920	99,304	0.0
– Total Consumpt	95,497	98,414	8,243	8,517	8,120	8,012	99,109	0.7
– Residues *	33,186	34,539	3,037	3,163	2,953	2,764	35,727	3.4
– Inventories	4,888	5,462	5,651	5,751	6,375	5,961	5,961	9.1
So. Atlantic – Total Receipts	31,582	31,982	2,838	2,726	2,616	2,596	32,536	1.7
– Total Consumpt	31,567	32,239	2,828	2,676	2,579	2,667	32,412	0.5
– Residues *	9,897	9,961	1,032	923	903	911	11,181	12.2
– Inventories	1,200	936	1,219	1,216	1,324	1,334	1,334	42.5
Northeast – Total Receipts	7,187	7,242	594	662	599	597	7,264	0.3
– Total Consumpt	7,216	7,072	565	595	534	558	7,080	0.1
– Residues *	1,664	1,575	121	135	123	124	1,505	–4.4
– Inventories	572	522	401	439	458	449	449	–14.0
South Central – Total Receipts	33,751	35,840	3,055	3,386	3,149	3,059	37,246	3.9
– Total Consumpt	33,646	35,791	3,095	3,242	3,088	3,027	36,784	2.8
– Residues *	9,890	10,539	938	1,020	953	920	11,518	9.3
– Inventories	1,160	1,336	1,307	1,474	2,072	1,879	1,879	40.6
North Central – Total Receipts	6,865	7,020	543	614	583	598	7,074	0.8
– Total Consumpt	6,929	6,963	515	633	604	605	7,129	2.4
– Residues *	1,334	1,422	100	105	121	92	1,308	–8.0
– Inventories	839	938	1,012	1,011	1,004	1,014	1,014	8.1
West – Total Receipts	16,152	17,196	1,261	1,324	1,233	1,068	15,184	–11.7
– Total Consumpt	16,139	16,349	1,240	1,371	1,315	1,155	15,704	–3.9
– Residues *	10,401	11,042	846	980	853	717	10,217	–7.5
– Inventories	1,117	1,730	1,712	1,611	1,517	1,285	1,285	–25.7

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

	IMPORTS FROM CANADA *						ANNUAL	% CHANGE
UNITED STATES TRADE WITH CANADA	YEAR 1989		NOVEMBER 1990		DECEMBER 1990		RATE Y-T-D 1990	FROM SAME PD LAST YEAR
	Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)	211,061	4,582	0	0	0	0	0	–100.0
Pulpwood chips	792,188	27,330	52,573	1,770	70,169	2,244	709,197	–10.5
Wood Pulp, Total A	4,353,343	2,599,247	337,923	184,391	287,316	156,848	4,322,418	–0.7
Waste Fibrous Materials, Total	164,217	31,659	10,347	2,881	7,430	2,007	130,452	–20.6
Paper, Board & Products, Total A	10,986,831	6,104,181	925,548	545,910	849,616	477,377	11,191,700	1.9
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. A	10,807,659	5,782,419	913,899	514,221	840,092	453,673	11,047,032	2.2
Paper, Paperboard & Products A	10,830,545	6,085,465	915,525	543,413	844,875	476,132	11,066,239	2.2
Paper & Paperboard, Only A	10,651,373	5,743,703	903,877	511,724	835,350	452,428	10,921,571	2.5
Paper, Total A	10,234,256	5,579,018	857,527	492,111	787,193	433,182	10,385,505	1.5
Newsprint A	8,330,874	4,278,705	657,728	347,773	613,269	312,032	8,118,161	–2.6
Printing, Writing & Rel. Pap. A	1,579,698	1,069,263	172,601	121,941	151,764	103,495	1,914,083	21.2
Pack. & Ind. Conv. Paper	217,159	119,140	15,484	9,558	11,742	6,801	211,903	–2.4
Special Industrial Paper	49,045	60,344	4,430	6,108	4,064	5,223	57,441	17.1
Tissue Paper	57,481	51,587	7,303	6,732	6,354	5,630	83,917	46.0
Paperboard, Total	417,117	164,685	46,350	19,612	48,158	19,246	536,067	28.5
Convtd Paper&Paperbd Products	179,172	321,762	11,848	31,889	9,524	23,704	144,898	–19.3
Wet Machine Board	293	245	106	91	3	2	884	201.4
Construction Paper & Board	155,993	38,472	9,916	2,407	4,738	1,243	124,578	–20.1

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

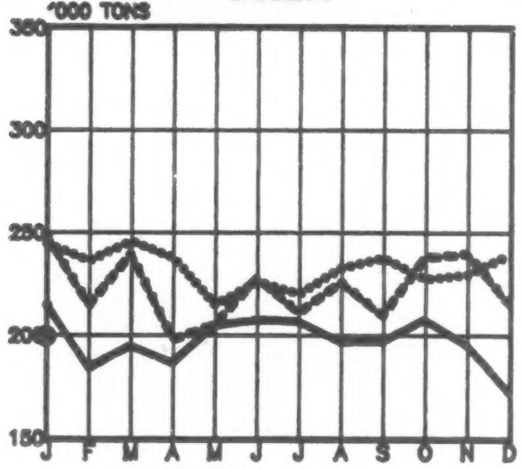
	EXPORTS TO CANADA *							
Pulpwood, Roundwood (in cubic meters)	62,892	1,120	178,809	4,362	84,914	2,251	1,036,727	1551.6
Pulpwood chips	28,218	1,241	15,353	657	14,748	638	193,841	586.9
Wood Pulp, Total	352,896	141,272	22,363	11,172	18,170	9,215	328,456	–6.9
Cotton Pulp & Other Pulp	6,215	4,249	453	396	346	370	4,373	–29.6
Waste Paper	284,379	38,555	54,179	9,445	39,892	7,309	653,204	129.7
Paper, Board & Products, Total	1,083,228	763,613	107,644	117,642	73,712	83,705	1,194,633	10.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	81,046	75,300	54,310	52,160	893,102	18.4
Paper, Paperboard & Products	1,062,560	755,810	107,495	117,510	73,671	83,656	1,192,443	12.2
Paper & Paperboard, Only	733,907	489,668	80,897	75,168	54,268	52,111	890,912	21.4
Paper, Total	371,206	340,312	48,303	54,709	33,472	39,767	521,586	40.5
Newsprint	8,316	5,891	2,260	1,228	1,272	734	20,813	150.3
Printing, Writing & Rel. Pap.	228,021	222,055	32,172	37,036	22,535	28,599	372,852	63.5
Pack. & Ind. Conv. Paper	65,390	29,624	5,550	3,972	3,727	2,781	52,367	–19.9
Special Industrial Paper	62,645	72,955	6,275	10,405	3,839	5,678	59,301	–5.3
Tissue Paper	6,834	9,787	2,047	2,068	2,099	1,875	16,253	137.8
Paperboard, Total	362,701	149,356	32,594	20,460	20,796	12,345	369,326	1.8
Convtd Paper&Paperbd Products	328,653	286,143	26,596	42,341	19,403	31,544	301,531	–8.3
Wet Machine Board	1,628	680	0	0	0	0	0	–100.0
Construction Paper & Board	19,040	7,143	149	132	42	48	2,190	–88.5

SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

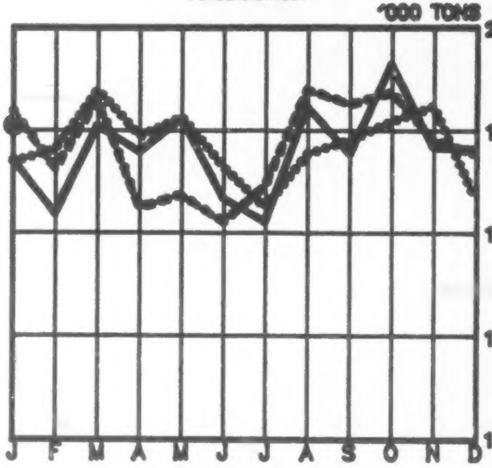
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



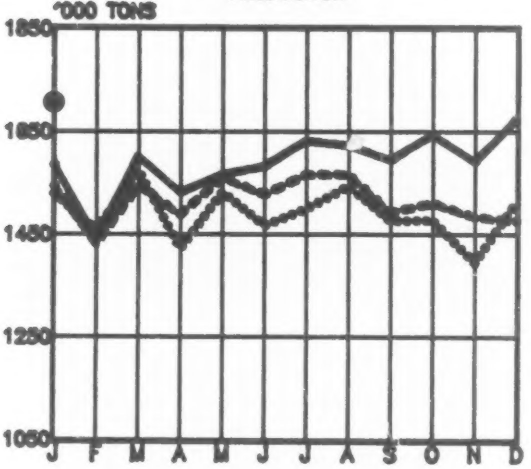
OTHER PAPER

PRODUCTION



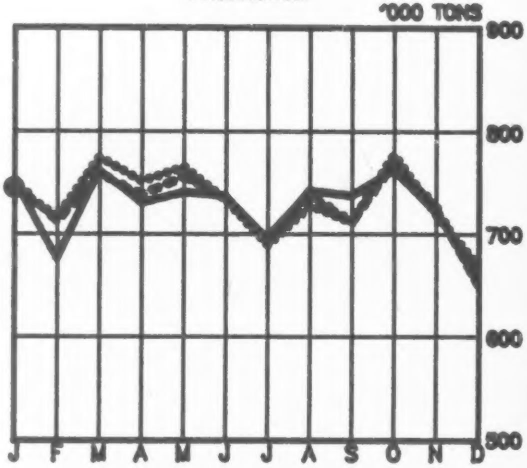
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



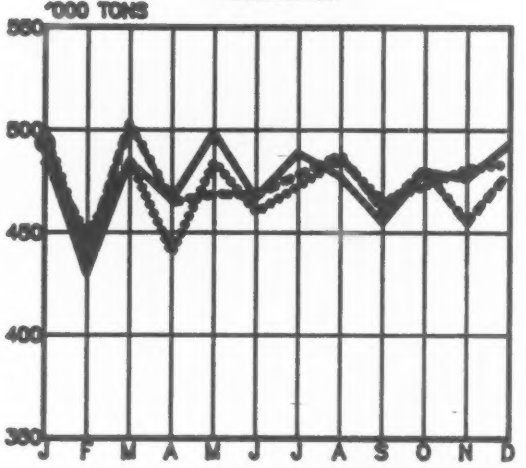
RECYCLED PAPERBOARD

PRODUCTION



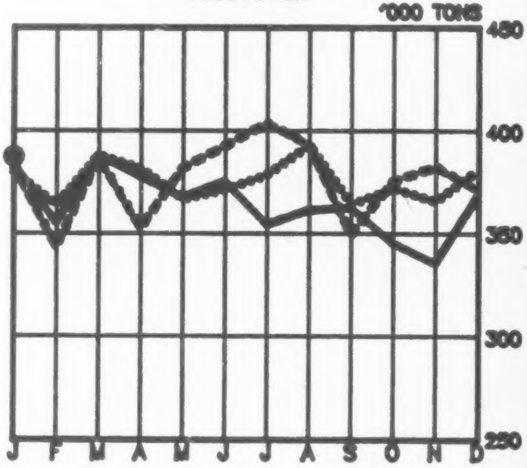
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1988 ········ 1989 ▬▬▬ 1990 ▬▬▬ 1991 ●

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989		NOVEMBER 1990		DECEMBER 1990		Annual Rate YTD 1990	% Change from same Period
		Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood Roundwood (cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood Chips		805,381	27,759	52,896	1,775	70,171	2,247	710,415	-11.8
Total All Imports	A	18,288,860	11,352,263	1,481,099	930,459	1,330,788	812,869	18,177,409	-0.6
Wood Pulp Total	A	5,005,100	2,980,642	389,895	210,448	329,117	176,448	4,893,355	-2.2
Waste Paper		172,575	33,197	9,721	2,337	6,745	1,493	122,539	-29.0
Other Fibrous Materials		11,254	8,518	1,082	664	1,257	846	14,037	24.7
Paper Board & Products Total	A	13,099,931	8,329,906	1,081,190	717,010	993,699	633,873	13,147,479	0.4
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	1,045,667	631,683	963,531	584,519	12,728,760	1.5
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,205	8,279,503	1,069,990	713,661	987,748	631,802	13,006,238	0.7
Paper & Paperboard Only	A	12,347,748	7,181,244	1,034,467	628,334	957,606	562,447	12,887,519	1.9
Paper Total	A	11,814,283	6,900,798	981,251	602,609	902,996	537,692	11,961,306	1.2
Newsprint	A	8,553,401	4,379,613	665,827	351,570	628,249	321,068	8,299,557	-3.0
Printing & Writing	A	2,732,978	1,996,141	269,494	200,452	236,189	173,329	3,104,863	13.6
Uncoated Groundwood		1,304,114	817,785	114,344	75,034	97,410	61,085	1,337,581	2.6
Coated Print.& Impreg. Pap.	A	774,022	632,484	71,959	59,194	65,166	53,302	936,046	20.9
Uncoated Free Sheet	A	583,077	462,404	76,172	57,948	67,289	51,263	752,448	29.0
Thin (except Cigarette)		12,711	15,200	1,000	1,373	957	1,516	11,366	-10.6
Bristols		59,052	68,267	6,019	6,903	5,366	6,162	67,424	14.2
Total Pkg & Other Paper		407,087	414,353	33,490	39,356	25,624	31,777	425,697	4.6
Unbleached Kraft Paper		239,303	116,011	17,988	9,087	12,190	6,224	235,352	-1.7
Other Pkg. & Indust. Paper		167,785	298,342	15,502	30,258	13,428	25,552	190,345	13.4
Tissue		120,797	110,691	12,440	11,233	12,933	11,519	131,189	8.6
Paperboard, Total		533,496	280,446	53,216	25,725	54,612	24,755	626,213	17.4
Test or Containerboard		85,048	34,401	7,783	3,263	6,623	2,803	113,629	33.6
Semi-Chemical Corrugating		118,176	36,462	7,497	1,986	11,692	3,216	111,935	-5.3
Other Paperboard		330,262	209,584	37,936	20,477	36,297	18,736	400,649	21.3
Convtd Paper&Paperbd Products		562,457	1,098,259	35,523	85,327	30,136	69,364	418,719	-25.6
Paper Products, Total		470,471	924,729	26,654	67,436	21,141	56,023	313,106	-33.4
Paperboard Products, Total		91,986	173,529	8,869	17,891	8,996	13,331	105,613	14.8
Wet machine Board		606	580	143	123	15	23	1,132	86.8
Construction Paper & Board E		189,119	49,824	11,057	3,225	5,906	2,046	140,110	-25.9
Notes									
Other: No Weight Avail. ($000)			136,624		13,040		10,862	136,809	0.1
Total Imports Incl. Other($000)			11,488,886		943,499		823,312	11,429,094	-0.5

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989		NOVEMBER 1990		DECEMBER 1990		Annual Rate YTD 1990	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood, Roundwood (cubic meters)	137,817	3,475	181,961	4,425	90,396	2,328	1,122,468	715.6
Pulpwood Chips	4,357,811	368,154	454,113	38,220	341,796	27,715	4,637,699	6.4
Total All Exports	18,633,606	8,603,945	1,568,278	715,413	1,588,639	695,985	19,342,229	3.8
Wood Pulp,Total	6,231,172	3,512,804	437,780	216,836	476,752	236,087	5,806,330	-6.2
Cotton Pulp and Other Pulp	122,045	100,310	10,367	7,797	9,963	7,906	135,632	11.1
Waste and Old Paper	5,980,620	729,797	573,081	64,310	577,792	66,431	6,504,870	8.8
Paper, Board & Products,Total	6,299,768	4,261,035	547,069	426,671	524,412	385,861	6,798,368	7.9
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,686	464,717	286,575	439,995	261,879	5,748,620	9.3
Paper, Ppbd & Prod ex Cnst&WMB	6,263,401	4,246,277	546,216	426,177	523,323	384,999	6,786,518	8.4
Paper & Paperboard, Only	5,223,466	2,967,928	463,924	286,061	438,906	261,217	5,738,790	9.9
Paper, Total	1,465,762	1,233,527	135,724	132,128	113,454	109,716	1,519,052	3.6
Newsprint	624,798	357,381	52,064	30,143	40,417	23,995	535,893	-14.2
Printing & Writing	478,201	485,168	52,578	68,252	46,019	53,736	664,824	39.0
Uncoated Groundwood	88,056	84,769	5,714	6,245	6,182	5,319	75,289	-14.5
Clay Coated Paper	168,539	131,418	15,827	16,061	12,233	12,537	218,694	29.8
Uncoated Free Sheet	122,346	169,830	19,582	29,922	18,593	26,299	232,369	89.9
Other Printing & Writing	99,290	102,154	11,456	10,024	9,601	9,582	138,472	39.5
Total Pkg. & Other Paper	342,041	380,790	27,249	39,368	22,480	29,034	283,684	-17.1
Unbleached Kraft	125,818	60,318	10,338	5,642	10,151	5,744	112,828	-10.3
Other Pkg. & Indust. Paper	216,223	320,472	16,910	33,826	12,329	22,280	170,756	-21.0
Tissue	20,712	30,187	3,843	4,305	3,939	4,252	34,651	67.3
Paperboard, Total	3,757,704	1,734,402	318,201	153,953	325,452	151,501	4,219,699	12.3
Solid Wood Pulp	3,572,764	1,646,152	290,065	143,856	311,328	143,147	3,993,101	11.8
Total Linerboard	2,499,716	935,364	211,636	78,699	231,158	84,718	2,924,140	17.0
Bleached Kraft Linerboard	283,113	127,787	38,019	17,222	29,695	13,143	335,444	18.5
Unbleached Kraft Linerbd	2,216,603	807,578	173,616	61,477	201,463	71,575	2,588,697	16.8
Other Unbleached Kraft	246,575	113,315	19,156	11,454	23,366	14,648	253,945	3.0
Other Bleached Kraft	795,305	582,979	64,061	52,250	51,995	42,405	764,560	-3.9
Semi-Chemical Corrugating	31,162	14,494	4,244	1,453	4,820	1,476	50,469	61.9
Recycled Paperboard	184,947	88,250	19,116	10,097	14,124	8,353	226,699	22.5
Convtd Paper&Paperbd Products	1,040,035	1,278,349	82,292	140,096	84,417	123,662	1,047,769	0.7
Paper Products, Total	473,435	832,806	40,334	89,934	38,177	81,233	440,793	-6.9
Paperboard Products, Total	566,601	445,543	51,968	50,162	46,240	42,449	606,975	7.1
Wet Machine Board	2,099	1,258	11	18	0	0	467	-68.2
Construction Paper & Board E	33,396	13,801	782	476	1,099	662	9,364	-71.9
Notes								
Other: No Weight Avail. ($000)		23,695		4,776		3,393	49,994	111.1
Total Exports Incl. Other($000)		8,627,611		720,188		699,384	9,125,306	5.8

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR 1989	YEAR 1990	OCT 1990	NOV 1990	DEC 1990	JAN 1991	Annual Rate Y-T-D 1991	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	132.4	133.0	132.9	133.0	132.9	132.4	132.4	–0.7
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.9	132.9	133.1	132.9	132.4	132.4	–0.5
Total Wood Pulp	157.4	152.2	147.3	145.7	144.7	133.5	133.5	–16.5
Total Paper	129.6	128.8	130.2	130.2	129.9	130.4	130.4	2.0
Writing Paper, exc. Newsprint	130.5	129.2	130.8	130.7	130.1	130.0	130.0	1.4
Newsprint	122.5	119.5	122.0	122.2	122.2	125.7	125.7	7.6
Total Paperboard	140.1	135.8	133.9	135.0	133.9	132.7	132.7	–4.7
Total Paper and Paperboard *	132.9	131.0	131.4	131.7	131.2	131.1	131.1	–0.2
Converted Products	131.7	135.2	135.7	135.8	135.9	136.0	136.0	1.2
Waste Paper	157.1	138.3	130.0	129.0	131.4	131.8	131.8	–13.1
All Commodities	112.2	116.3	120.8	120.1	118.6	118.9	118.9	3.5
Industrial Commodities	111.6	115.8	121.3	120.6	118.9	119.3	119.3	4.6

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

Paper and Allied Products Companies

Sales and Earnings

	Sales 1990 (Thousand Dollars)	Sales 1989 (Thousand Dollars)	90/89 % Change	Net Profit After Taxes 1990 (Thousand Dollars)	Net Profit After Taxes 1989 (Thousand Dollars)	90/89 % Change	Net Profits/Sales 1990 %	Net Profits/Sales 1989 %
			26	Paper and Allied Products Companies				
First Quarter	17,673,508	16,422,853	7.6	1,044,062	1,306,431	–20.1	5.91	7.95
Second Quarter	17,929,571	17,488,269	2.5	1,002,756	1,305,363	–23.2	5.59	7.46
Third Quarter	17,958,647	17,230,522	4.2	772,576	1,341,052	–42.4	4.30	7.78
Fourth Quarter	17,435,073	16,810,765	3.7	545,997	1,144,581	–52.3	3.13	6.81
Full Year	70,996,790	67,952,409	4.5	3,365,391	5,097,427	–34.0	4.74	7.50
			3	Forest Product Companies				
First Quarter	5,416,303	5,235,292	3.5	266,856	341,967	–22.0	4.93	6.53
Second Quarter	6,412,918	5,810,058	10.4	259,256	375,263	–30.9	4.04	6.46
Third Quarter	6,144,408	5,730,507	7.2	206,766	396,336	–47.8	3.37	6.92
Fourth Quarter	5,508,986	5,510,253	0.0	116,918	81,085 *	N.M.	2.12	N.M.
Full Year	23,482,615	22,286,110	5.4	849,796	1,194,671	N.M.	3.62	N.M.

* Includes net nonrecurring charge at one major company

N.M. – Not Meaningful

paperboard -- largely offset by an 8% decline in boxboard production for other uses, such as tube, can and drum stock, gypsum wallboard facing and panelboard.

Much of the boxboard increase occurred in folding boxboard, where production for domestic use surged 5.6% above its year-ago level. Solid bleached and recycled board rose moderately, but production of unbleached kraft folding boxboard for domestic use was 18% over its year-earlier rate, maintaining the gains realized in the last two months of 1990. Production of milk carton and food service boxboard for domestic use was also sharply above its January 1990 total in January 1991, but production of these grades for export declined.

EXPORTS, IMPORTS AND NEW SUPPLY

Preliminary data for January 1991 show mixed trends for exports, with production of paperboard for export above its fourth quarter 1990 level and wood pulp production for export below its recent trend, but up 40% from one year-ago.

Complete Department of Commerce data for 1990 reported total paper and paperboard exports at 5.7 million tons, 9.9% over their 1989 high. When the construction grades and converted products are included, the total rises to 6.8 million tons, up 7.9% from 1989. While the major tonnage gains occurred in the paperboard grades (see table on page 9), exports of printing-writing papers increased by 39%, from 478,000 tons in 1989 to 665,000 tons in 1990. Tissue paper exports also made a sizable percentage gain, going from 21,000 tons in 1989 to 35,000 tons in 1990.

Imports showed only modest increases. Census data indicate that newsprint imports declined 3%, to 8.3 million tons, holding the gain in total paper and paperboard to 1.9%. Converted products imports also declined, keeping total imports at the 13.1 million-ton level, for a gain of 0.4%.

With exports rising faster than imports, new supply (production plus imports less exports, a proxy for consumption) of paper and paperboard in 1990, at 86.5 million tons, was 1.7% above its 1989 total, compared to the 2.4% increase in production. With real GNP rising only 0.9%, the faster increase in new supply brought the new supply/real GNP ratio up slightly from its 1989 level but still on the low side of its long term trend.

FIBROUS RAW MATERIALS

The paper industry continues to increase its use of waste paper as a paper-making fiber. API's Capacity Survey indicated that paper, paperboard and building paper and board mills consumed 21,791,000 tons of waste paper in 1990, equivalent to 27.2% of total paper and board production, compared to 25.8% in 1989 and 23.5% in 1980. API board production, compared to 25.8% in 1989 and 23.5% in 1980. API estimates that another 750,000 tons of waste paper was used for such products as molded pulp, insulation and animal bedding. These totals, together with a record-high 6,505,000 tons of waste paper exported, less 123,000 tons imported, add to a collection total of 28,926,000 tons, equivalent to 33.4% of total paper and board new supply. This put the industry well on its way to the goal of collecting 40% of the total new supply by the end of 1995.

Consumption of wood pulp at paper and paperboard mills also increased in 1990, rising 1.3% to 61.5 million tons. API's Capacity Survey reports that paper and paperboard producers plan to increase their use of wood pulp at a 2% per year rate in the 1991-1993 period and their use of waste paper by more than 7% per year.

According to preliminary data, production of chemical paper grade market wood pulp in January 1991 was 5% ahead of its year-ago rate. Shipments showed an even larger gain when measured against the relatively low level reported for January 1990. The January 1991 shipments total, however, was 60,000 metric tons below production, resulting in a comparable rise in inventories. In spite of this, the 27 days of supply reported for the month-end January 1991 was 10% below the 30 days of supply reported one year earlier.

Export shipments continued to dominate the market, accounting for 62% of the chemical paper grade shipments total. Western Europe was the major export market, taking 44% of total exports; the Asian/African countries (excluding Japan) took 22%; Japan, 20%.

SALES AND EARNINGS

Data reported in the press on sales and earnings of 26 paper and allied products companies indicate that fourth quarter 1990 sales held up well, climbing 3.7% above their year ago total. The 1990 total of $71 billion, equivalent to about 60% of the industry total, was 4.5% above 1989.

Net profit after taxes reported by these companies, however, continued the downward slide evident in the earlier quarters. The fourth quarter 1990 total was 52% below that of the fourth quarter of 1989, bringing the net profit-to-sales ratio to 3.1%, compared to 6.8% in the year-earlier quarter. Total 1990 after-tax profits were 34% below those of 1989; the profits-to-sales ratio 4.7%.

Similar data for three forest products companies with significant paper industry capacity showed trends similar to those reported for paper companies. Their year-to-year decline in earnings were somewhat steeper, however, reflecting weaknesses in the housing and wood products markets (see table on bottom of page 10).

HISTORICAL PROFILE OF THE PAPER INDUSTRY

The table on page 12 provides historical perspective on key paper industry data that regularly appear on the Industry Data Sheet insert. These years (1980 - 1990), reflect the growth of the industry through two distinct business cycles.

The Data Sheet is structured to summarize prevailing industry and market trends. The first two tiers present input/output data reviewing new supply components (production plus imports less exports) and raw materials consumption.

Given the sheer size of the paper industry and the widespread use of its products, it is no surprise that the new supply of paper, paperboard and converted products tends to track the growth of the total economy. From 1980 to 1990, real GNP rose by 30.4%, for an average annual gain of 2.7%. At the same time, new supply of paper, paperboard and converted products rose 32.1% (2.8% per year), while paper and paperboard production increased 28.7%, or 2.6% a year. The sharper rise in new supply relative to production reflected a 56.6% increase in imports, only partially offset by the 31.8% gain in exports.

The Data Sheet also chronicles the paper industry's financial health. Particularly notable is the high levels of sales and earnings in the 1988-1989 period. As sales leveled out in 1990, earnings declined, bringing the ratio of profit to sales near the low end of their long-term relationship. This did not affect capital commitments in 1990, and expenditures on new plant and equipment continued to rise. Some reduction, however, is expected in 1991. Significantly, the decline in employment at paper and paperboard mills and the accompanying increase in productivity competitively positioned the U.S. paper industry in the world economy.

The lower tiers of this table present data on the major markets for paper and paperboard. The paper and paperboard demand indexes, for example, relate trends in paper and paperboard new supply (a proxy for consumption) to market activity. The market data are combined into indexes which indicate the movement of total demand for each of these product groups separately.

Other important market data include consumption of newsprint by publishers as reported by the American Newspaper Association: magazine advertising pages as reported by the Publishers Information Bureau; and fibre box shipments and inventories as reported by the Fibre Box Association. Each of these series relate to specific sectors of paper and paperboard demand.

The table also presents broad economic information, such as trends in retail and wholesale trade, total industrial production and real disposable income. Finally, it shows per capita consumption of paper and paperboard to summarize their use in terms of people.

INDUSTRY DATA	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
PAPER AND PAPERBOARD — Tons (000)											
Total Production (API).......: excluding :..............................	61,042	62,109	59,290	64,949	68,449	66,988	70,905	74,368	76,455	76,722	78,588
Imports (including Products).: wet :..............................	8,304	7,941	7,603	8,509	10,576	11,105	11,597	12,528	12,788	12,910	13,006
Exports (including Products).: machine :..............................	5,148	4,561	4,187	4,502	4,310	4,003	4,593	5,197	5,559	6,263	6,787
Apparent Consumption.........: grades :..............................	64,198	65,489	62,706	68,956	74,715	74,090	77,910	81,700	83,684	83,369	84,787
Paper Production % Tonnage Capacity..............................	92.2	91.7	87.2	91.9	92.8	90.6	93.5	94.5	95.4	93.0	93.4
Paperboard Production % Tonnage Capacity..............................	91.7	90.5	82.0	90.7	94.5	89.7	93.6	95.7	94.5	93.8	93.6
PAPER, PAPERBOARD AND PRODUCTS											
IMPORTS.....:Including Construction and :..............................	8,780	8,339	8,024	8,986	11,075	11,522	11,936	12,837	13,110	13,100	13,147
EXPORTS.....: WMB Grades (excl. HPB) :..............................	5,214	4,641	4,246	4,569	4,387	4,071	4,687	5,304	5,691	6,300	6,796
MARKET WOOD PULP PRODUCTION – Tons (000)..........	6,466	6,202	5,733	6,527	6,899	6,801	7,573	8,112	8,565	8,664	8,823
TOTAL WOOD PULP PRODUCTION – Tons (000)......f......	50,734	52,042	49,334	52,453	55,470	54,147	57,002	59,550	61,161	61,998	63,275
WOOD PULP IMPORTS – Tons (000)..............................	4,051	4,087	3,656	4,093	4,490	4,466	4,582	4,850	5,038	5,005	4,893
WOOD PULP EXPORTS – Tons (000)..............................	3,806	3,678	3,395	3,644	3,954	3,795	4,458	4,889	5,528	6,231	5,905
RAW MATERIALS CONSUMPTION – Tons (000)											
PAPER AND BOARD MILLS...: excluding :....................											
Wood Pulp......................:consumption for:....................	50,120	50,497	48,061	51,422	54,994	53,682	57,222	58,675	60,294	60,727	61,834
Waste Paper....................:construction & :....................	13,551	13,875	13,564	14,696	15,926	15,734	17,268	17,993	19,021	19,490	21,039
TOTAL......................: WMB grades :....................	63,671	64,372	61,625	66,118	70,920	69,416	74,490	76,668	79,315	80,217	82,873
PULPWOOD CONSUMPTION Cords(000)Am.Pulpwd.Asn.	79,703	81,178	76,257	85,442	87,646	85,744	91,434	93,946	95,497	98,414	99,194
EMPLOYMENT (000)											
Paper and Allied Products..........Total..............................	684.6	680.5	655.4	653.9	674.0	671.3	667.7	674.9	689.9	697.1	698.5
Pulp, Paper and Board Mills........Total......A....................	260.2	259.3	251.9	249.0	250.3	245.9	242.1	240.4	247.2	229.6	229.3
AVG. HOURLY EARN'S OF PRODUCTION WORKERS ($)											
Paper and Allied Products..............................	7.84	8.60	9.32	9.93	10.41	10.83	11.18	11.43	11.66	11.96	12.30
Pulp, Paper Mills......A..............................	9.22	10.14	10.97	11.81	12.55	13.26	13.75	14.11	14.31	14.73	15.20
Paperboard Mills..............................	9.28	10.23	11.11	12.11	12.99	13.60	13.98	14.30	14.49	14.76	15.25
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS (Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	6.52	6.11	5.60	5.92	7.21	8.59	8.77	9.01	10.92	15.58	16.84 Y
INDEX OF OUTPUT PER MAN–HOUR (1982=100)...........											
:IN PULP, PAPER :...Production Workers..............................	93.5	92.7	100.0	106.7	108.2	111.1	119.7	123.9	127.5	125.9	128.0
:AND BOARD MILLS:...All Employees..............................	94.4	93.8	100.0	107.4	108.7	110.6	120.1	124.0	127.6	126.5	128.6
PAPER AND ALLIED PRODUCTS (Million $)											
Industry Shipments (Dept. of Commerce)*..............................	72,865	80,248	79,866	84,635	94,781	93,333	97,888	110,317	124,173	130,501	131,080
Pulp, Paper and Paperboard*..............................	31,791	35,112	33,990	36,101	41,365	39,119	41,040	47,080	55,227	57,700	56,358
Inventories (End of Period) – Total Industry*....................	7,812	8,613	9,059	9,346	10,211	10,020	10,369	11,242	12,065	12,571	12,980
Pulp, Paper and Paperboard*..............................	2,937	3,231	3,518	3,451	3,828	3,829	3,745	3,907	4,325	4,980	5,305
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)											
Sales (Corporations Only)..............................	56,250	62,699	60,293	65,008	71,891	71,465	74,844	95,576	107,221	113,573	114,987 #
Earnings (Corporations Only)..............................	2,800	3,110	1,460	2,327	3,015	2,880	3,280	5,520	8,081	7,047	5,687 #
Depreciation (Corporations Only)..............................	2,026	2,267	2,379	2,607	2,798	3,099	3,389	4,279	4,625	5,010	5,424 #
Net Worth (Corporations Only)..............................	24,396	26,558	26,705	27,219	28,160	29,694	31,221	39,217	42,940	45,642	46,185 #
PRICE INDEXES (Bureau of Labor Stats)(1982=100)											
Pulp, Paper & Products, ex. Building Grades....................	91.7	99.1	100.0	99.3	107.3	106.9	107.6	114.3	124.8	132.4	133.0
Wood Pulp..............................	100.3	104.8	100.0	91.5	104.8	91.4	94.7	111.5	136.7	157.4	152.2
Waste Paper..............................	172.2	145.0	100.0	N.A.	198.2	122.9	142.6	181.4	183.6	157.1	138.3
Paper..............................	89.7	97.7	100.0	98.5	105.8	106.0	107.0	111.5	123.2	129.6	128.8
Paperboard..............................	92.0	101.2	100.0	98.4	110.4	107.7	106.6	116.1	133.2	140.1	135.8
PAPER DEMAND (INDEX 1987=100)											
Total Paper Production *..............................	81.6	83.7	81.9	88.8	93.3	92.3	96.3	100.0	103.9	103.6	106.7
Paper New Supply *..............................	78.6	80.2	76.8	84.4	91.5	90.7	95.4	100.0	102.4	102.0	103.8
Demand Indicators – (Weighted Average) *....................	77.3	78.7	80.5	83.7	88.2	90.8	94.0	99.9	103.9	107.8	110.1
Production of Nondurable Goods *...(21.2%)....................	89.1	89.6	89.7	91.9	93.4	94.4	97.6	100.0	103.7	106.4	107.7
Disposable Income ....*.(23.9%)....................	82.7	84.0	84.5	87.1	92.3	95.0	98.5	99.8	104.6	107.2	108.1
Total Printing and Publishing *...(54.9%)....................	70.3	72.1	75.2	79.0	84.5	87.6	90.7	100.0	103.6	108.6	111.9
PAPERBOARD DEMAND (INDEXED: 1987=100)											
Total Paperboard Production *..............................	82.6	83.4	77.6	85.9	90.8	87.9	94.4	100.0	101.8	102.7	104.6
Production for Domestic Use	80.3	83.6	77.3	84.3	91.0	89.1	94.0	100.0	102.2	103.0	104.6
Demand Indicators – (Weighted Average) *....................	86.6	87.6	84.3	87.9	93.8	94.7	96.4	100.0	104.7	107.2	107.9
Production of Consumer Goods *...(62.06%)....................	85.3	85.8	84.5	88.8	92.8	93.7	96.8	100.0	104.0	106.6	107.3
Production of Equipment *...(5.75%)....................	74.6	78.2	77.0	76.8	89.2	94.8	94.5	100.0	107.6	112.3	115.5
Production of Materials *...(32.19%)....................	91.3	92.8	85.1	88.3	96.6	96.6	95.9	100.0	105.6	107.4	107.7
MARKET DATA											
Consumption by Publishers – Tons (000)....................	11,120	11,204	11,129	11,606	12,510	12,684	13,088	13,562	13,497	13,493	13,391
Newspaper Pub. and Printing Empl. Total(000)....................	420	420	419	426	440	451	461	470	474	473	478
Magazine Advertising Pages (PIB, Inc.)....................	118,372	123,182	121,617	141,126	157,798	155,545	154,317	164,771	172,580	181,560	172,428
Wholesalers Sales and Inventories (Million $)											
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales....................	22,608	25,072	25,937	27,755	32,591	33,684	35,809	40,818	46,554	50,740	52,352
Inventories (End of Period)....................	1,999	2,271	2,211	2,654	2,906	3,191	3,360	3,454	3,959	4,137	4,269
FIBRE BOX DATA (Fibre Box Association)											
Fibre Box Shipments (Million square feet)....................	241,377	246,152	235,185	252,539	267,547	267,453	283,921	297,828	308,509	312,205	315,775
Container'bd Inventory at Mill & Plant(000Tons)....................	1,984	2,729	2,584	2,437	2,882	2,549	2,236	2,486	2,553	2,589	2,765
RETAIL TRADE (Billion $)											
Total Retail Sales *..............................	957	1,039	1,069	1,171	1,288	1,376	1,450	1,542	1,650	1,734	1,799
Nondurable Goods Stores Sales *..............................	658	714	733	779	833	877	909	965	995	1,062	1,152
GENERAL ECONOMIC DATA											
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*.	84.1	85.7	81.9	84.9	92.8	94.4	95.3	100.0	105.4	108.1	109.2
PRODUCER PRICES (ALL COMMODITIES) (1982=100)....	89.8	98.0	100.0	101.3	103.7	103.2	100.2	102.8	106.9	112.2	116.3
CONSUMER PRICES (ALL ITEMS) (INDEX 1982–4=100)...	82.4	90.9	96.5	99.6	103.9	107.6	109.6	113.6	118.3	124.0	130.7
GROSS NATIONAL PRODUCT – ANNUAL RATE (Billion$).											
G.N.P. or Expenditure – Current $....................	2,732	3,053	3,166	3,406	3,772	4,015	4,232	4,516	4,874	5,201	5,464
G.N.P. or Expenditure – 1982 $....................	3,187	3,249	3,166	3,279	3,501	3,619	3,718	3,845	4,017	4,118	4,156
PAPER AND PAPERBOARD CONSUMPTION – POUNDS PER CAPITA..............................	564	569	539	587	630	619	645	670	680	670	679

f - Wood Pulp Production exc del., explo & scr. A - Estimated by API Y - Full year estimated by Dept. of Commerce # - Annual rate through 3rd quarter, 1990 * Seasonally Adjusted

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 2
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PRODUCTION (000 TONS)

	(P) JAN 1991	(R) DEC 1990	JAN 1990	FIRST 1 MONTH 1991	FIRST 1 MONTH 1990	% CHANGE YR TO DATE 1991/1990
PAPER GRADES						
Newsprint	580	576	553	580	553	4.7
Printing & Writing	1,883	1,763	1,946	1,883	1,946	-3.2
Uncoated Groundwood (s)	144	147	156	144	156	-7.7
Coated Groundwood (s)	348	327	360	348	360	-3.3
Coated Free Sheet (s)	281	237	289	281	289	-2.7
Total Coated Paper (s)	629	564	649	629	649	-3.0
Uncoated Free Sheet Paper (s)	981	930	1,000	981	1,000	-1.9
Thin Paper (s)	20	14	24	20	24	-19.2
Cotton Fiber Paper (s)	13	11	14	13	14	-5.7
Bleached Bristols (s)	97	96	104	97	104	-6.0
Tissue Paper	485	484	474	485	474	2.5
Total Pkg & Other Paper	394	357	400	394	400	-1.4
Unbl. Kraft Paper (s)	202	173	215	202	215	-6.1
Bl. Kraft Paper (s)	35	37	43	35	43	-18.1
Specialty Pkg. Paper	50	51	46	50	46	9.0
Special Industrial Paper (s)	107	97	96	107	96	11.6
TOTAL PAPER	3,342	3,181	3,372	3,342	3,372	-0.9
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,823	1,795	1,687	1,822	1,687	8.0
Unbleached Kraft Linerboard	1,708	1,677	1,586	1,708	1,586	7.7
Other Unbl. Kraft Paperboard	115	118	101	114	101	12.5
Semichemical Paperboard	497	494	490	497	490	1.5
Bleached Paperboard	393	369	384	393	384	2.3
Recycled Paperboard	750	663	752	750	752	-0.4
TOTAL PAPERBOARD	3,462	3,321	3,313	3,462	3,313	4.5
TOTAL PAPER AND PAPERBOARD	6,804	6,502	6,685	6,804	6,685	1.8

WOOD PULP (ALL GRADES)	DEC 1990	NOV 1990	DEC 1989	FULL YEAR 1990	FULL YEAR 1989	% CHANGE YR TO DATE 1990/1989
Dissolving & Special Alpha	123	71	117	1,293	1,425	-9.3
Bleached Sulfite) Unbleached Sulfite)	132	121	122	1,561	1,563	-0.2
Bleached & Semi-Bl. Sulfate	2,360	2,236	2,108	27,562	26,949	2.3
Unbleached Sulfate	1,900	1,808	1,765	22,188	21,669	2.4
Semichemical	359	347	357	4,219	4,363	-3.3
Groundwood & Thermomechanical	554	543	523	6,452	6,029	7.0
TOTAL PULP DIVISION DATA	5,428	5,125	4,991	63,275	61,996	2.1

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA February 28, 1991	1989	1990	1990	1990 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD — Tons (000)			NOVEMBER	DECEMBER	JANUARY		
Total Production (API)..........: excluding :..........	76,722	78,568	6,526	6,502	6,804	81,651	1.8
Total Seasonally Adjusted.........: construction :..........			6,632	6,559	6,607	79,281	1.8
Imports (including Products).......: and wet :......E..........	12,910	13,006	1,070	988	1,120	13,440	0.6
Exports (including Products).......: machine :......E..........	6,263	6,787	546	523	585	7,140	2.4
Apparent Consumption..............: grades :..........	83,369	84,787	7,155	7,064	7,132	85,581	1.5
Paper Production % Tonnage Capacity..........	93.0	93.4	93.9	88.1	91.4	91.4	-
Paperboard Production % Tonnage Capacity..........	93.8	93.6	92.3	92.1	95.3	95.3	-
PAPER, PAPERBOARD AND PRODUCTS			OCTOBER	NOVEMBER	DECEMBER		
Imports.....:Including Construction and :..........	13,100	13,147	1,166	1,081	994	N.M.	N.M.
Exports.....: WMB Grades (excl. HPB) :..........	6,300	6,796	578	547	524	N.M.	N.M.
MARKET WOOD PULP PRODUCTION – Tons (000)..........	8,864	8,823	728	680	735	N.M.	N.M.
TOTAL WOOD PULP PRODUCTION – Tons (000)..........	61,886 f	63,276 f	5,442	5,125	5,428	N.M.	N.M.
WOOD PULP IMPORTS – TONS (000)..........	5,005	4,893	445	380	329	N.M.	N.M.
WOOD PULP EXPORTS – TONS (000)..........	6,231	5,905	491	438	477	N.M.	N.M.
RAW MATERIALS CONSUMPTION – Tons (000)							
PAPER AND BOARD MILLS....: excluding :..........			OCTOBER	NOVEMBER	DECEMBER		
Wood Pulp..........: consumption for :..........	60,727	61,834	5,260	4,933	4,945	N.M.	N.M.
Waste Paper..........: construction & :..........	19,490	21,039	1,726	1,636	1,554	N.M.	N.M.
TOTAL..........: WMB grades :..........	80,217	82,873	6,987	6,569	6,499	N.M.	N.M.
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	96,414	99,109	8,517	8,120	8,012	N.M.	N.M.
EMPLOYMENT (000)			NOVEMBER	DECEMBER	JANUARY		
Paper and Allied Products.........Total..........	697.1	698.5	696.3	695.7	690.4	690.4	-0.5
Pulp, Paper and Board Mills.......Total......A..........	229.6	229.3	227.2	227.8	227.6	227.6	-0.7
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			NOVEMBER	DECEMBER	JANUARY		
Paper and Allied Products..........	11.96	12.30	12.53	12.53	12.51	12.51	3.3
Pulp, Paper Mills.......A..........	14.73	15.20	15.58	15.41	15.31	15.31	3.0
Paperboard Mills.......E..........	14.76	15.25	15.75	15.69	15.57	15.57	3.9
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q2	1990 Q3	1990 Q4		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.84 Y	18.59	16.74	14.46	N.M.	N.M.
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			NOVEMBER	DECEMBER	JANUARY		
:IN PULP, PAPER :...Production Workers..........	125.9 RS	128.0	129.7	130.5	130.5	130.5	0.8
:AND BOARD MILLS:...All Employees..........	126.6 RS	128.6	130.8	131.7	131.7	131.7	1.4
PAPER AND ALLIED PRODUCTS (Million $)			NOVEMBER	DECEMBER	JANUARY		
Industry Shipments (Dept. of Commerce)*..........	130,501	131,080	10,882	10,882	10,521	126,252	-1.5
Pulp, Paper and Paperboard*..........	57,700	56,356	4,727	4,806	4,507	54,084	-1.0
Inventories (End of Period) – Total Industry*..........	12,571	12,860	12,787	12,860	13,086	13,086	2.7
Pulp, Paper and Paperboard*..........	4,980	5,305	5,233	5,305	5,292	5,292	6.9
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q1	1990 Q2	1990 Q3		
Sales (Corporations Only)..........	113,573	114,987 #	28,534	28,844	28,862	N.M.	N.M.
Earnings (Corporations Only)..........	7,047	5,887 #	1,389	1,630	1,246	N.M.	N.M.
Depreciation (Corporations Only)..........	5,010	5,424 #	1,347	1,341	1,380	N.M.	N.M.
Net Worth (Corporations Only)..........	45,642	46,185 #	48,519	45,587	46,185	N.M.	N.M.
PRICE INDEXES (Bureau of Labor Stats)1982=100			NOVEMBER	DECEMBER	JANUARY		
Pulp, Paper & Products, ex. Building Grades..........	132.4	133.0	133.0	132.9	132.4	132.4	-0.7
Wood Pulp..........	157.4	152.2	145.7	144.7	133.5	133.5	-16.5
Waste Paper..........	157.1	138.3	129.0	131.4	131.8	131.8	-13.1
Paper..........	129.6	128.8	130.2	129.9	130.4	130.4	2.0
Paperboard..........	140.1	135.8	136.0	133.9	132.7	132.7	-4.7
PAPER DEMAND (INDEXED: 1987=100)			NOVEMBER	DECEMBER	JANUARY		
Total Paper Production *..........	103.6	106.7	107.5	103.8	105.8	105.8	-0.9
Paper New Supply *..........	102.0	103.8	104.5	100.2	103.5	103.5	-2.1
Demand Indicators – (Weighted Average) *..........	107.8	110.1	110.2	110.7	110.4	110.4	0.8
Production of Nondurable Goods.........*....(21.2%)..........	106.4	107.7	107.7	107.4	106.9	106.9	-0.6
Disposable Income..........*....(23.9%)..........	107.2	108.1	107.1	107.7	106.6	106.6	1.5
Total Printing and Publishing..........*....(54.9%)..........	108.6	111.9	112.6	113.3	113.3	113.3	2.3
PAPERBOARD DEMAND (INDEXED: 1987=100)			NOVEMBER	DECEMBER	JANUARY		
Total Paperboard Production *..........	102.7	104.6	108.5	108.8	107.4	107.4	4.5
Production for Domestic Use	103.0	104.6	107.6	108.0	105.9	105.9	4.6
Demand Indicators – (Weighted Average) *..........	107.2	107.9	107.0	105.9	105.7	105.7	-0.7
Production of Consumer Goods..........*....(62.06%)..........	106.6	107.3	106.5	105.8	105.7	105.7	-0.3
Production of Equipment..........*....(5.75%)..........	112.3	115.5	114.9	113.3	113.0	113.0	1.1
Production of Materials..........*....(32.19%)..........	107.4	107.7	106.6	104.9	104.4	104.4	-1.7
MARKET DATA			OCTOBER	NOVEMBER	DECEMBER		
Consumption by Publishers – Tons (000)..........	13,493	13,391	1,153	1,136	1,133	N.M.	N.M.
Newspaper Pub. and Printing Empl. Total(000)..........	473	478	479	478	477	N.M.	N.M.
Magazine Advertising Pages (PIB, Inc.)	181,580	172,428	17,744	16,917	15,202	N.M.	N.M.
Wholesalers Sales and Inventories (Million $)			OCTOBER	NOVEMBER	DECEMBER		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales..........	50,740	52,352	4,880	4,257	3,862	N.M.	N.M.
Inventories (End of Period)..........	4,137	4,269	4,395	4,276	4,269	N.M.	N.M.
FIBRE BOX DATA (Fibre Box Association)			NOVEMBER	DECEMBER	JANUARY		
Fibre Box Shipments (Million square feet)..........	312,205	315,775	24,955	21,412	27,227	326,724	-1.4
Container'bd Inventory at Mill & Plant (000 Tons)..........	2,589	2,765	2,535	2,765	3,049	3,049	13.6
RETAIL TRADE (Billion $)							
Total Retail Sales *..........	1,734	1,799	151.7	149.5	148.2	1,778	-1.1
Nondurable Goods Stores Sales *..........	1,082	1,152	98.3	97.9	97.9	1,175	4.6
GENERAL ECONOMIC DATA			NOVEMBER	DECEMBER	JANUARY		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*..........	108.1	109.2	108.2	107.0	106.5	106.5	-0.9
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)..........	112.2	116.3	120.1	118.6	118.9	118.9	3.5
CONSUMER PRICES (ALL ITEMS–URBAN CON.) (1982–4=100)..........	124.0	130.7	133.8	133.8	134.6	134.6	5.7
GROSS NATIONAL PRODUCT – ANNUAL RATE (Billion$)			1990 Q2	1990 Q3	1990 Q4		
G.N.P. or Expenditure – Current $..........	5,201	5,464	5,443	5,515	5,521	N.M.	N.M.
G.N.P. or Expenditure – 1982 $..........	4,118	4,156	4,155	4,170	4,160	N.M.	N.M.
PAPER AND PAPERBOARD CONSUMPTION – POUNDS PER CAPITA	670	679	N.M. – Not meaningful			680	

f – Wood Pulp Prod exc dsl., explo & scr. R – Revised RS – Revised series E – Last month estimated by API A – Est. by API Y – Full year est. by Dept. of Commerce * Seasonally Adjusted # 3-qtr. annual rate

A2500-2

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.3 MARCH 1991

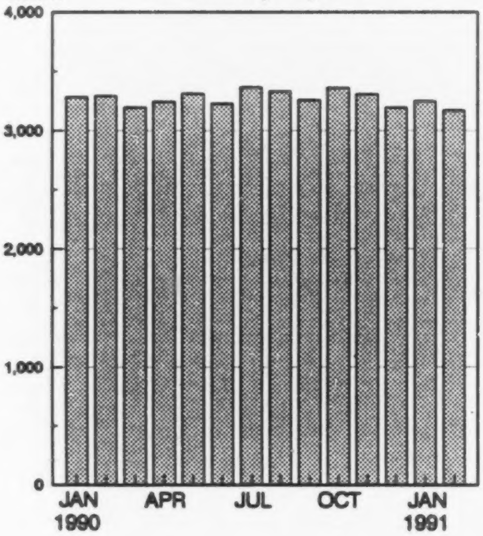
PAPER AND PAPERBOARD PRODUCTION: JANUARY-FEBRUARY 1991

Total production of paper and paperboard remained above year-ago levels in the first two months of 1991, at a rate fractionally below that of the full year 1990. A 2.6% decline in paper production was offset by a 4.2% increase in paperboard. The seasonally-adjusted rate of output moved downward from January to February, largely reflecting continued slippage in the paper grades.

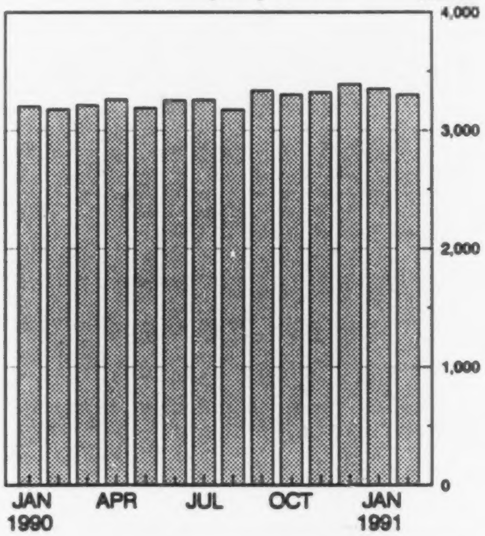
The charts below trace the seasonally-adjusted monthly trends of paper and paperboard production for the 1990 and the first two months of 1991.

Paper: The decline in paper was centered on the printing-writing grades, with the preliminary estimate of January-February 1991 shipments 5.0% below its comparable 1990 total. As the table on page 3 shows, all the major grade totals were down. Among the major printing-writing paper markets, data for January 1991 indicate that the largest declines were recorded in shipments to magazine publishers and stationery manufacturers, with commercial printers showing a more modest reduction in their purchases, while book publishers and office reprographics users increased their requirements.

PAPER PRODUCTION
seasonally adjusted



PAPERBOARD PRODUCTION
seasonally adjusted



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Shipments of uncoated free sheet papers, which account for more than half the printing-writing paper total, were off by 5.5%. The weakness here was concentrated in shipments to commercial printers and envelope manufacturers; while shipments to business forms producers showed a small decline, but book publishers increased their purchases of these papers.

The drop in paper shipments to magazine publishers was largely concentrated in the coated groundwood grades. Shipments of these papers to commercial printers were above their year-ago levels, with the total moving close to the volume used at magazines. Commercial printers are the major users of coated free sheet papers, and they made only small reductions in their receipts of these grades.

Newsprint production remained above year-ago levels during the first two months of 1991, with increases in production for domestic use offsetting a decline in exports. The rate of newsprint consumption by newspaper publishers in January 1991 was fractionally below its year-ago level, but well above the October 1990 low. Newspaper publishers increased their newsprint inventories to 43 days of supply in January, bringing them near the high side of the 1989-1990 range.

Tissue paper production held close to its year-ago rate in the January-February 1991 period. These papers, a major consumer product, are among the grades that are affected by cyclical changes in the economy.

While unbleached kraft paper shipments continued to decline, demand for these papers, as measured by new supply (production plus imports less exports) augmented by packaging papers made from recovered (waste) paper, increased by an estimated 1.8% from January-February 1990 to the first two months of this year. Bleached kraft paper shipments declined sharply, but specialty packaging papers reported major gains. The annualized rate of production of these specialty papers, however, was only 4.4% ahead of the average rate for 1990 as a whole (see table on page 3).

Paperboard: The seasonally adjusted rate of paperboard production showed only a small decline from January to February 1991, with the two-month major grade totals well above their year-ago levels. The 1991 gain reflected an 8.4% increase in production for export, with the annualized rate close to an unprecedented 4 million tons. The unbleached kraft grades, accounting for three-fourths of the export total, were up by 10.7%.

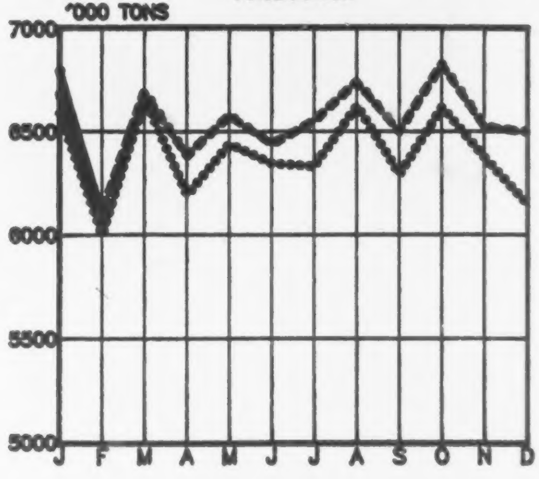
The steep upward trend in containerboard inventories at mills and plants evident from October 1990 to January 1991 ended with a 0.1% gain in February. The per-diem rate of containerboard production for domestic use for fibre boxes declined in February from its January level, but the two-month 1991 total was still 5.3% above

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		NOV	DEC	JAN (R)	FEB (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
	1989	1990	1990	1990	1991	1991	1991	
PAPER								
Newsprint – Production	6,088	6,615	564	578	576	522	6,586	3.3
– Shipments	6,079	6,628	564	576	561	513	6,564	2.9
Printing & Writing: Total Shipments	21,626	22,381	1,865	1,763	1,889	1,662	21,307	-5.0
Groundwood Paper – Shipments	1,743	1,768	151	147	145	132	1,658	-6.7
– New Orders	1,741	1,834	136	161	171	130	1,803	-3.9
– Unfilled Orders	193	182	213	215	235	230	230	26.5
Coated Groundwood – Shipments	4,059	4,214	369	327	352	314	3,993	-2.8
Coated Free Sheet – Shipments	3,157	3,307	273	237	281	251	3,191	-3.0
Total Coated Papers – Shipments	7,215	7,521	642	564	633	564	7,184	-2.9
– New Orders	7,171	7,423	589	531	596	501	6,585	-3.8
– Unfilled Orders	706	589	643	591	535	479	479	-18.8
Uncid Free Sheet – Shipments	11,061	11,510	942	930	962	846	10,968	-5.5
– New Orders	11,097	11,499	888	862	915	802	10,306	-9.7
– Unfilled Orders	748	692	778	685	598	574	574	-17.0
Thin Papers – Shipments	262	234	19	14	20	17	223	-20.2
Cotton Fiber Paper – Shipments	161	161	13	11	13	11	144	-13.0
Bleached Bristols – Shipments	1,164	1,188	98	96	97	91	1,131	-6.7
Tissue Paper – Production	5,636	5,802	477	484	485	438	5,540	-0.2
Total Packaging & Other Paper	4,916	4,613	387	357	388	360	4,490	-1.3
Unbl. Kraft Paper – Shipments	2,681	2,377	196	173	202	186	2,326	-3.1
Bl. Kraft Paper – Shipments	468	484	41	37	35	36	424	-15.4
Specialty Pkg. Paper – Production	520	563	52	51	53	46	588	13.7
Special Industrial Paper – Shipments	1,248	1,190	99	97	99	93	1,152	1.7
TOTAL PAPER PRODUCTION – UNADJUSTED	38,266	39,411	3,294	3,181	3,339	2,961	37,923	-2.6
TOTAL PAPER PRODUCTION – SEAS ADJ			3,308	3,195	3,254	3,153	38,437	-2.6
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,265	2,281	2,376	2,424	2,165	27,529	5.8
Cont'bd For Dom Use for Fibre Boxes	23,752	24,320	2,079	2,066	2,156	1,893	24,295	5.3
Total Linerboard	16,399	16,870	1,453	1,426	1,504	1,308	16,870	6.7
Unbleached Kraft	15,833	16,404	1,405	1,388	1,454	1,260	16,285	5.5
Solid Bleached	178	132	11	10	12	10	136	8.1
Recycled	388	334	38	29	38	38	450	83.8
Corrugating Medium	7,339	7,443	625	640	652	584	7,415	2.4
Semichemical	5,554	5,566	469	480	489	434	5,538	3.0
Recycled	1,785	1,877	156	160	163	150	1,877	0.6
Container Chip and Filler	14	7	1	0	0	1	10	0.0
Other Containerboard for Dom Use	307	282	17	24	23	21	259	3.9
Containerboard for Export	2,369	2,662	185	285	245	251	2,975	9.9
Boxboard	12,029	11,891	954	945	1,042	948	11,940	0.8
Boxboard for Packaging for Dom Use	7,076	6,975	571	575	640	581	7,328	6.0
Folding Boxboard	5,370	5,239	440	446	481	442	5,540	6.4
Solid Bleached	1,980	1,827	139	159	167	148	1,889	0.1
Unbleached Kraft	987	970	89	94	92	93	1,108	21.6
Recycled	2,403	2,442	213	193	222	202	2,543	5.6
Set-up Boxboard for Dom Use	288	297	23	19	23	22	275	-13.9
Milk Carton & Food Service Dom Use	1,419	1,439	108	111	136	117	1,513	8.9
Other Boxboard for Domestic Use	4,089	3,971	313	285	318	281	3,591	-9.1
Boxboard for Export	863	946	69	85	83	87	1,021	4.2
Paperboard Production by Furnish	38,456	39,156	3,234	3,321	3,465	3,113	39,469	4.2
Unbleached Kraft	19,490	20,335	1,698	1,795	1,823	1,624	20,684	7.0
Semichemical	5,691	5,710	477	494	499	453	5,708	3.5
Solid Bleached Kraft	4,521	4,380	336	369	393	359	4,509	1.7
Recycled	8,754	8,731	723	663	751	677	8,568	-0.1
Paperboard Production for Export	3,232	3,608	254	370	328	338	3,997	8.4
Unbleached Kraft	2,363	2,678	188	289	254	251	3,033	10.7
Semichemical	138	143	8	14	10	18	170	21.2
Bleached Kraft	693	734	56	64	58	64	730	-5.0
Recycled	38	52	3	3	6	4	64	56.0
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,456	39,156	3,234	3,321	3,465	3,113	39,469	4.2
TOTAL PAPERBOARD PROD – SEAS ADJ			3,324	3,395	3,353	3,307	39,960	4.2
PAPER AND PAPERBOARD – UNADJ	76,722	78,568	6,528	6,502	6,804	6,094	77,393	0.8
PAPER AND PAPERBOARD – SEAS ADJ			6,632	6,589	6,607	6,459	78,397	0.7

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

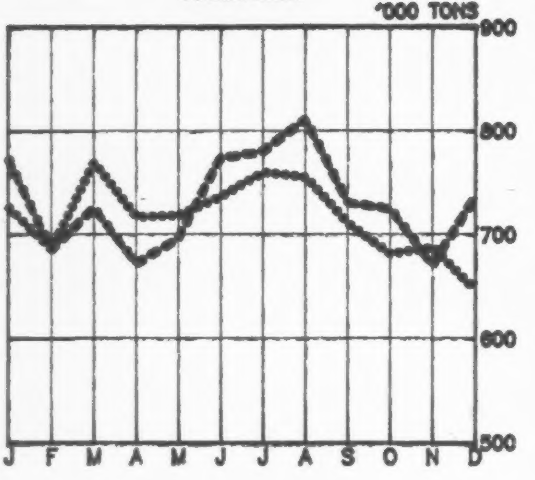
TOTAL PAPER AND PAPERBOARD

PRODUCTION



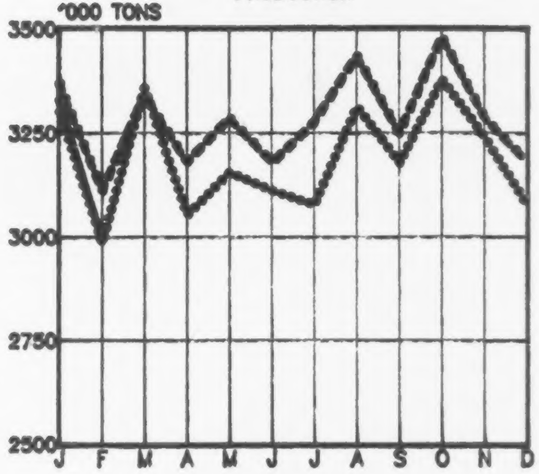
MARKET WOOD PULP

PRODUCTION



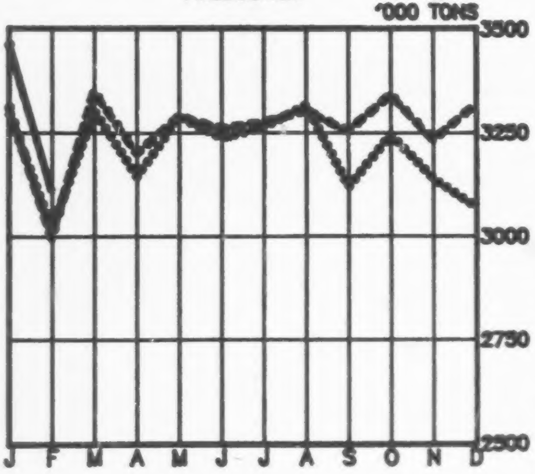
TOTAL PAPER

PRODUCTION



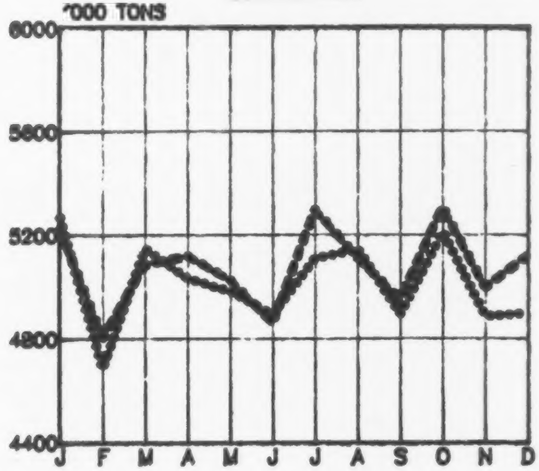
TOTAL PAPERBOARD

PRODUCTION



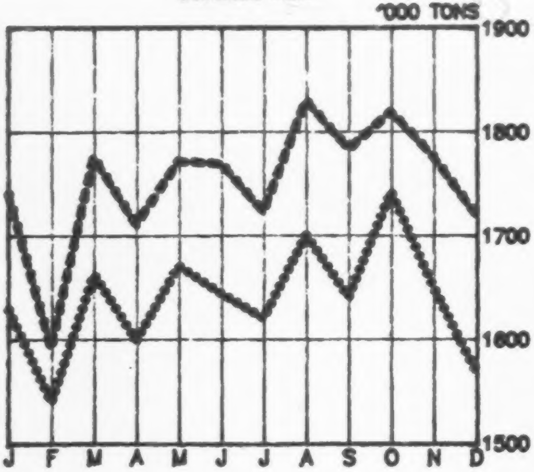
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 ········ 1990 ━━━━ 1991 ——

WOOD PULP STATISTICS (Thousands of Tons)		YEAR 1989	YEAR 1990	OCT 1990	NOV 1990	DEC (R) 1990	JAN (P) 1991	Annual Rate Y-T-D 1991	% Change From Same Period Last Year
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,998	63,068	5,410	5,123	5,428	5,541	66,491	1.8
	Imports A	5,005	4,893	445	390	329	423	5,073	2.4
	Exports	6,231	5,905	491	438	477	475	5,706	13.2
	New Supply	60,772	62,056	5,365	5,075	5,280	5,488	65,858	1.0
Dissolving Pulp	Production	1,425	1,293	91	71	123	115	1,380	-8.0
	Imports	284	222	21	20	23	10	118	-43.9
	Exports	836	782	56	57	68	52	626	-9.5
	New Supply	873	733	56	34	77	73	872	-14.4
Paper Grades Chemical Pulp	Production	50,181	51,192	4,395	4,163	4,392	4,492	53,902	2.0
	Imports A	4,370	4,326	392	348	293	387	4,639	3.9
	Exports	5,325	5,080	433	378	404	422	5,066	18.4
	New Supply	49,226	50,438	4,354	4,132	4,280	4,456	53,474	0.9
Groundwood and Thermo-Mech	Production	6,029	6,363	569	543	554	563	6,760	4.5
	Imports A	351	345	32	22	14	26	316	14.5
	Exports	70	44	2	3	4	1	13	-81.1
	New Supply	6,309	6,665	600	562	563	589	7,063	5.8
Semi-Chemical	Production	4,363	4,219	355	347	359	371	4,450	-0.8
	Imports								
	Exports								
	New Supply	4,363	4,219	355	347	359	371	4,450	-0.8
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,664	8,798	726	672	737	763	9,155	-1.3
	Imports	3,539	3,215	293	257	226	256	3,068	-10.3
	Exports	5,309	5,561	441	415	530	435	5,224	34.1
	New Supply	6,893	6,451	578	514	433	583	6,999	-20.5
Dissolving Pulp	Production	1,422	1,292	91	71	123	115	1,380	-8.0
	Imports	210	170	16	17	16	7	83	1.7
	Exports	821	782	53	52	85	58	691	-9.3
	New Supply	810	679	54	36	54	64	772	-5.8
Paper Grades Chemical Pulp	Production	7,242	7,506	635	601	614	648	7,774	-0.1
	Imports	3,072	2,813	259	225	197	229	2,754	-10.7
	Exports	4,489	4,779	388	364	446	378	4,532	44.7
	New Supply	5,825	5,540	506	462	366	500	5,995	-22.5
Groundwood Pulp and All Other	Production	0	0	0	0	0	0	1	N.M.
	Imports RS	258	232	18	16	13	19	231	-9.1
	Exports	0	0	0	0	0	0	0	0.0
	New Supply	258	232	18	16	13	19	232	-8.2

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce.

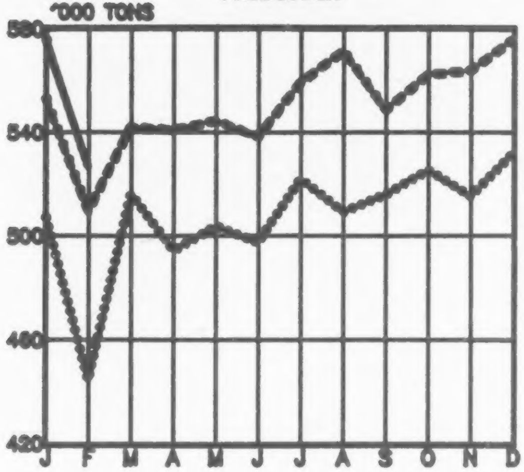
NOTE: A - API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS - Revised Series.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1989	YEAR 1990	OCT 1990	NOV 1990	DEC (R) 1990	JAN (P) 1991	Annual Rate 1991	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,067	7,139	6,786	6,851	7,232	86,783	3.7
Total Wood Pulp	60,252	61,032 R	5,317	5,008	5,129	5,399	64,786	3.1
Waste Paper	19,490	21,035	1,822	1,778	1,722	1,833	21,996	5.2
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	210	201	226	201	201	-1.4
Producers' Market Inventories	342	476	484	505	476	522	522	3.3
Consumers' Purchased Inventories #	519	392	422	358	392	419	419	-22.3
Waste Paper at Paper & Bd. Mills	1,082	924	1,024	995	924	941	941	-15.2
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	22	24	23	27	27	-10.0

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # Includes all grades of wood pulp N.M. - Not Meaningful
P - Preliminary; R - Revised; 0 - Indicates zero to five-hundred short tons

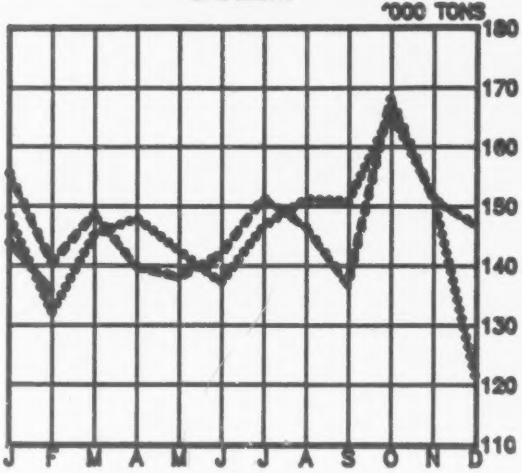
NEWSPRINT

PRODUCTION



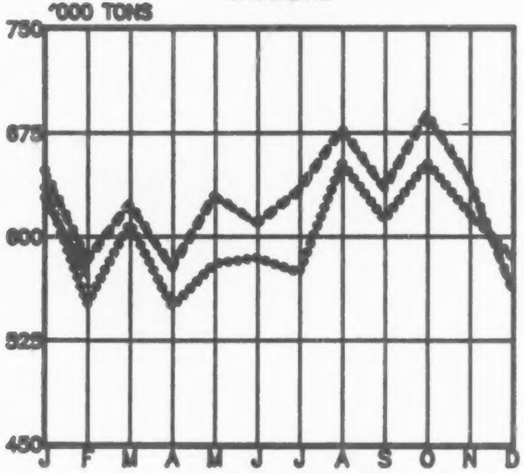
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



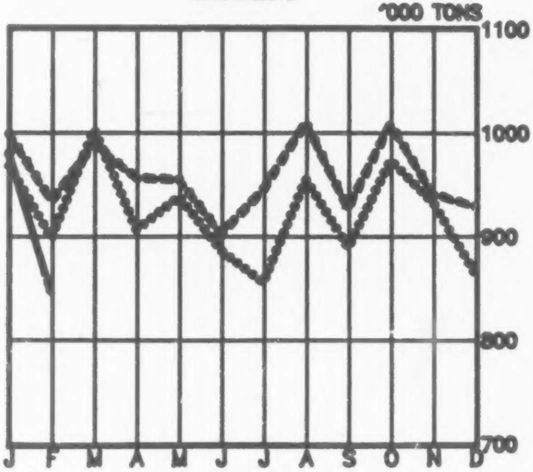
COATED PAPER

SHIPMENTS



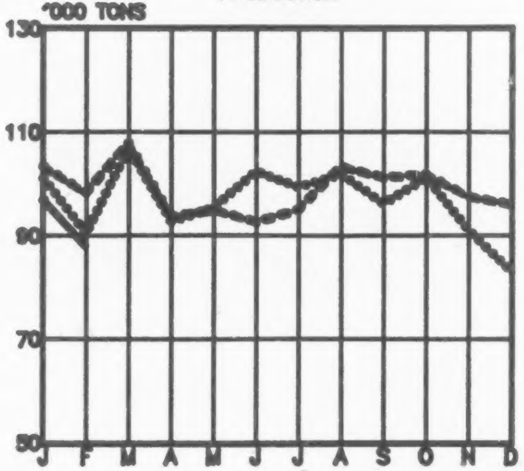
UNCOATED FREE SHEET PAPERS

SHIPMENTS



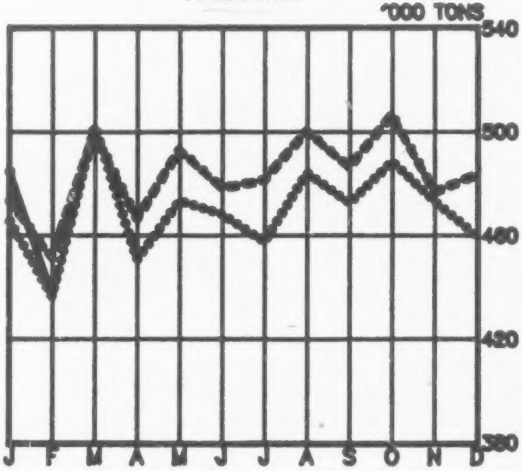
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1989 ········ 1990 ━━━━ 1991 ━━━━

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1989	YEAR 1990	OCTOBER 1990	NOVEMBER 1990	DECEMBER 1990	JANUARY 1991	ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,279	99,304	8,712	8,180	7,920	8,779	105,348	0.4
– Total Consumpt	98,414	99,109	8,517	8,120	8,012	8,801	105,612	2.9
– Residues *	34,530	35,727	3,163	2,953	2,764	2,969	35,628	–4.2
– Inventories	5,432	5,961	5,751	6,375	5,961	5,732	5,732	2.9
So. Atlantic – Total Receipts	31,962	32,636	2,728	2,616	2,886	2,792	33,504	–3.2
– Total Consumpt	32,239	32,412	2,876	2,579	2,607	2,868	34,416	3.1
– Residues *	9,961	11,161	923	903	911	991	11,892	–2.4
– Inventories	936	1,334	1,218	1,324	1,334	1,257	1,257	25.7
Northeast – Total Receipts	7,242	7,284	662	589	597	694	8,328	0.3
– Total Consumpt	7,072	7,080	595	534	558	589	7,068	–7.8
– Residues *	1,575	1,505	135	123	124	146	1,752	15.0
– Inventories	522	449	430	458	449	504	504	–8.9
South Central – Total Receipts	35,840	37,246	3,386	3,149	3,869	3,467	41,604	19.4
– Total Consumpt	35,791	36,784	3,242	3,088	3,027	3,431	41,172	12.0
– Residues *	10,539	11,516	1,020	953	920	1,028	12,336	11.3
– Inventories	1,338	1,879	1,474	2,072	1,879	1,715	1,715	31.5
North Central – Total Receipts	7,020	7,074	614	583	598	748	8,976	8.7
– Total Consumpt	6,983	7,129	633	604	605	647	7,764	2.5
– Residues *	1,422	1,308	105	121	92	93	1,116	–17.0
– Inventories	938	1,014	1,011	1,004	1,014	1,113	1,113	11.4
West – Total Receipts	17,186	15,184	1,324	1,233	1,066	1,078	12,936	–24.0
– Total Consumpt	18,349	15,704	1,371	1,316	1,185	1,268	15,192	–11.8
– Residues *	11,042	10,217	960	853	717	711	8,532	–22.9
– Inventories	1,730	1,285	1,611	1,517	1,285	1,143	1,143	–33.4

SOURCE: American Pulpwood Association

* – Consumption of Residues in cords equivalent

UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA *						ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
		YEAR 1990		DECEMBER 1990		JANUARY 1991			
		Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)		0	0	0	0	0	0	0	N.M.
Pulpwood chips		709,197	22,413	70,169	2,244	42,863	1,306	514,356	–14.2
Wood Pulp, Total	A	4,322,418	2,514,301	287,316	155,848	392,029	166,580	4,704,342	2.8
Waste Fibrous Materials, Total		130,452	31,442	7,430	2,007	8,109	1,812	97,304	–38.8
Paper, Board & Products, Total	A	11,191,700	6,317,580	849,616	477,377	962,774	586,889	11,553,282	3.2
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	A	11,047,032	5,968,425	840,092	453,673	950,920	538,290	11,411,042	3.2
Paper, Paperboard & Products	A	11,088,239	6,284,416	844,875	476,132	957,651	565,499	11,491,810	3.7
Paper & Paperboard, Only	A	10,921,571	5,935,250	836,350	452,428	945,798	536,901	11,349,570	3.6
Paper, Total	A	10,385,505	5,723,101	787,193	433,182	897,941	517,105	10,775,287	2.0
Newsprint	A	8,118,161	4,162,493	613,269	312,032	693,453	372,408	8,321,431	–0.2
Printing, Writing & Rel. Pap.	A	1,914,083	1,286,073	151,764	103,495	174,360	122,211	2,092,319	14.9
Pack. & Ind. Conv. Paper		211,903	121,069	11,742	6,801	20,369	12,119	244,422	–0.7
Special Industrial Paper		57,441	88,444	4,064	5,223	3,524	5,059	42,292	–50.0
Tissue Paper		83,917	76,023	6,354	5,630	6,235	5,309	74,824	5.7
Paperboard, Total		536,067	212,149	48,158	19,246	47,857	19,795	574,283	47.4
Convtd Paper&Paperbd Products		144,668	349,166	9,524	23,704	11,853	28,599	142,240	5.1
Wet Machine Board		884	757	3	2	71	69	853	–23.6
Construction Paper & Board		124,576	32,418	4,736	1,243	5,052	1,330	60,619	–43.5

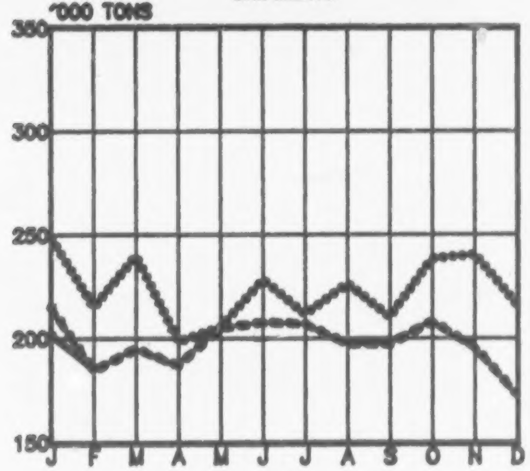
EXPORTS TO CANADA *								
Pulpwood, Roundwood (in cubic meters)	1,036,727	36,801	84,914	2,251	192,580	6,071	2,310,960	563.2
Pulpwood chips	193,841	9,066	14,748	636	19,089	637	229,063	76.7
Wood Pulp, Total	326,456	186,506	16,170	9,215	23,359	12,062	280,307	–36.5
Cotton Pulp & Other Pulp	4,373	4,284	346	370	534	487	6,402	56.6
Waste Paper	663,204	118,346	39,892	7,309	49,386	9,418	592,637	–4.0
Paper, Board & Products, Total	1,194,633	1,317,384	73,712	83,705	112,581	128,863	1,350,971	12.3
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	54,310	52,160	85,199	81,608	1,022,384	9.9
Paper, Paperboard & Products	1,192,443	1,315,696	73,671	83,656	112,465	128,571	1,349,581	12.2
Paper & Paperboard, Only	890,912	818,590	54,268	52,111	85,063	81,526	1,020,996	9.8
Paper, Total	521,586	595,952	33,472	39,767	49,692	58,727	596,309	10.5
Newsprint	20,913	11,369	1,272	734	1,585	939	19,021	–35.9
Printing, Writing & Rel. Pap.	372,852	424,207	22,535	26,569	36,156	41,200	421,873	15.4
Pack. & Ind. Conv. Paper	52,367	36,780	3,727	2,781	5,176	3,987	62,110	10.0
Special Industrial Paper	59,301	106,279	3,839	5,678	5,079	9,758	60,947	–17.4
Tissue Paper	16,253	17,297	2,099	1,975	2,607	2,645	32,358	129.5
Paperboard, Total	369,326	222,636	20,798	12,345	35,301	22,799	424,696	8.9
Convtd Paper&Paperbd Products	301,531	497,106	19,403	31,544	27,382	47,044	328,590	20.4
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,689	42	49	116	82	1,390	74.9

SOURCE: Bureau of Census, Department of Commerce.

E – Estimate of tonnage based on square foot data

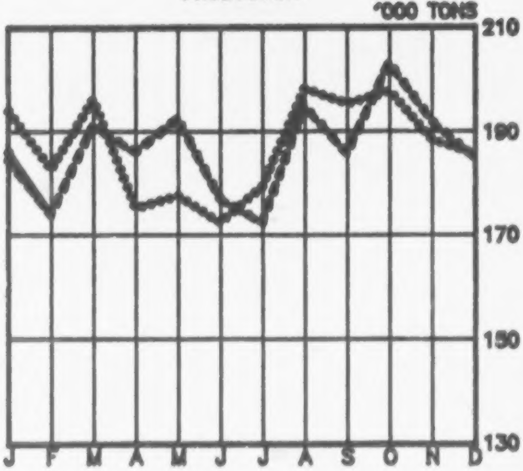
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



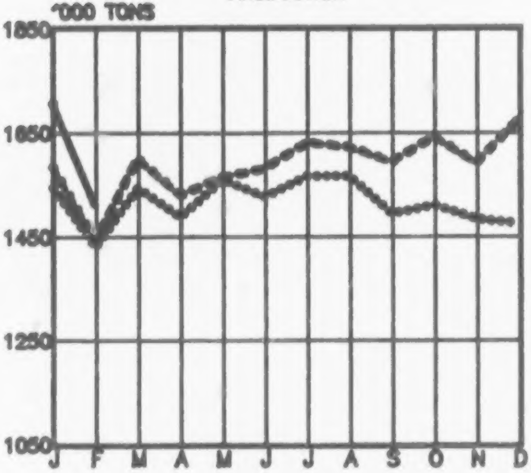
OTHER PAPER

PRODUCTION



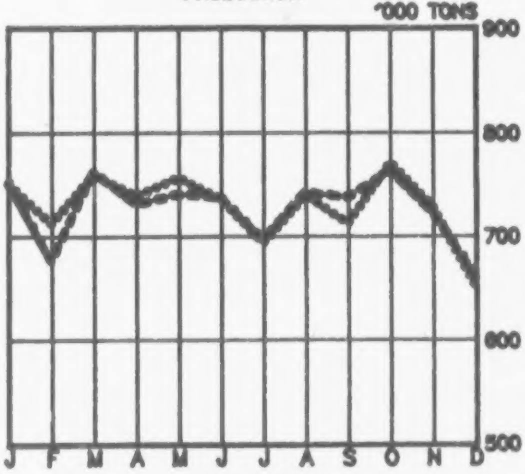
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



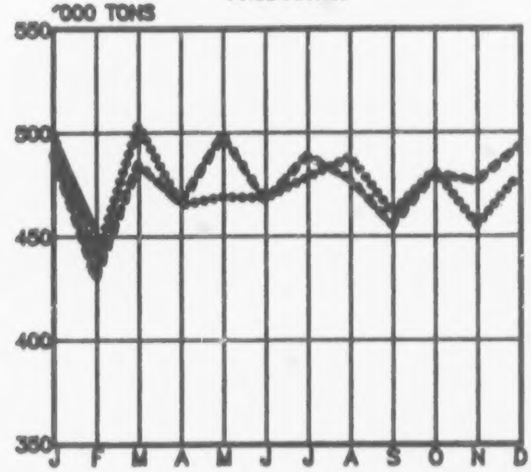
RECYCLED PAPERBOARD

PRODUCTION



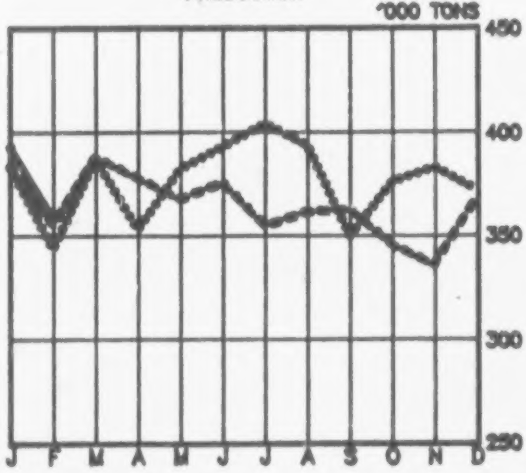
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1989 •••••••• 1990 ━ ━ ━ ━ 1991 ━━━━━

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1990		DECEMBER 1990		JANUARY 1991		Annual Rate YTD 1991	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)		0	0	0	0	0	0	0	ERR
Pulpwood Chips		710,416	22,560	70,171	2,247	42,907	1,316	514,884	-14.2
Total All Imports	A	18,177,409	11,292,256	1,330,788	812,659	1,544,019	836,616	18,528,230	-0.4
Wood Pulp Total	A	4,893,355	2,831,327	329,117	176,448	422,721	209,145	5,072,652	2.4
Waste Paper		122,539	26,349	6,745	1,493	8,300	1,632	100,319	-32.1
Other Fibrous Materials		14,037	9,296	1,257	846	955	983	11,456	-25.7
Paper Board & Products Total	A	13,147,479	8,425,293	993,669	633,873	1,111,984	724,855	13,343,804	-1.0
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,728,760	7,425,583	963,531	564,519	1,061,260	651,141	12,875,114	-0.8
Paper Ppbd & Prds ex Cnst&WMB	A	13,006,238	8,382,641	987,746	631,802	1,105,993	722,782	13,271,911	-0.6
Paper & Paperboard Only	A	12,587,519	7,382,931	957,608	562,447	1,075,286	649,078	12,903,221	-0.4
Paper Total	A	11,961,306	7,077,036	902,996	537,692	1,020,171	624,247	12,242,060	-1.7
Newsprint	A	8,299,557	4,247,131	628,249	321,068	703,995	376,919	8,447,939	-2.5
Printing & Writing	A	3,104,963	2,248,424	236,189	173,329	268,278	189,746	3,219,336	1.5
Uncoated Groundwood		1,337,581	843,550	97,410	91,065	118,310	78,323	1,419,714	4.5
Coated Print.& Impreg. Pap.	A	936,046	749,082	65,166	53,302	70,498	58,559	845,957	-11.4
Uncoated Free Sheet	A	752,448	584,479	67,259	51,263	70,549	54,104	848,583	7.3
Thin (except Cigarette)		11,365	14,296	957	1,518	1,323	1,590	15,870	25.7
Bristols		67,424	77,017	5,366	6,162	7,601	8,880	91,212	57.9
Total Pkg & Other Paper		425,697	462,237	25,624	31,777	37,027	36,172	444,326	-11.6
Unbleached Kraft Paper		235,352	116,655	12,196	6,224	22,962	11,282	275,543	2.9
Other Pkg. & Indust. Paper		190,345	345,582	13,428	25,552	14,065	26,890	168,784	-28.2
Tissue		131,189	119,244	12,933	11,519	10,871	9,411	130,448	10.7
Paperboard, Total		626,213	305,895	54,612	24,755	55,095	24,831	661,171	32.5
Test or Containerboard		113,629	48,929	6,623	2,803	7,673	3,245	92,077	-7.0
Semi-Chemical Corrugating		111,836	31,152	11,692	3,216	9,618	2,405	115,416	9.3
Other Paperboard		400,649	227,180	36,297	18,736	37,807	19,181	453,678	64.2
Convtd Paper&Paperbd Products		418,719	999,710	30,138	69,354	30,724	73,714	368,690	-8.8
Paper Products, Total		313,106	807,967	21,141	56,023	22,471	58,877	269,651	-15.2
Paperboard Products, Total		105,613	191,744	8,996	13,321	8,253	14,837	99,040	14.8
Wet machine Board		1,132	991	15	27	71	59	853	-34.7
Construction Paper & Board E		140,110	41,661	5,909	2,048	5,920	2,004	71,040	-40.9
Notes									
Other: No Weight Avail. ($000)			136,809		10,652		10,251	123,010	31.5
Total Imports Incl. Other($000)			11,429,064		823,312		846,866	11,362,391	-4.1

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		DECEMBER 1990		JANUARY 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	1,122,468	39,971	90,386	2,328	195,024	6,377	2,340,288	406.9
Pulpwood Chips	4,637,969	412,018	341,796	27,715	409,906	36,798	4,918,866	29.8
Total All Exports	19,352,011	9,075,342	1,588,636	695,995	1,753,989	784,278	21,047,867	14.3
Wood Pulp,Total	5,905,239	3,155,671	476,753	236,067	475,471	230,783	5,705,646	13.2
Cotton Pulp and Other Pulp	135,632	104,808	9,663	7,906	8,028	6,929	96,310	11.9
Waste and Old Paper	6,514,652	779,667	577,789	66,431	620,254	71,222	7,443,052	18.0
Paper, Board & Products,Total	6,796,388	5,035,177	524,412	385,581	650,248	475,344	7,802,980	11.8
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	439,995	261,879	549,026	329,063	6,588,316	11.2
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,663	523,323	384,898	646,373	473,794	7,756,476	11.2
Paper & Paperboard, Only	5,738,750	3,443,249	438,906	261,217	545,151	327,533	6,541,811	10.5
Paper, Total	1,519,052	1,455,104	113,454	109,716	124,976	131,842	1,499,716	-4.8
Newsprint	535,993	293,182	40,417	23,695	36,750	22,136	440,995	-20.4
Printing & Writing	664,824	717,700	46,619	53,736	62,415	70,376	748,995	11.5
Uncoated Groundwood	75,290	63,574	6,192	5,319	5,496	4,806	65,948	-12.8
Clay Coated Paper	218,684	215,289	12,233	12,537	19,397	18,362	232,762	14.5
Uncoated Free Sheet	232,389	306,127	18,593	26,299	24,838	34,373	298,060	22.7
Other Printing & Writing	138,472	132,709	9,601	9,582	12,686	12,833	152,226	1.8
Total Pkg. & Other Paper	283,584	403,949	22,480	28,034	21,716	34,834	260,582	-3.2
Unbleached Kraft	112,828	60,480	10,151	5,744	7,396	4,563	88,627	-8.2
Other Pkg. & Indust. Paper	170,756	343,469	12,329	22,289	14,330	30,271	171,955	-0.4
Tissue	34,651	40,273	3,939	4,252	4,096	4,497	49,153	38.4
Paperboard, Total	4,219,698	1,988,144	325,452	151,501	420,175	195,690	5,042,095	18.1
Solid Wood Pulp	3,993,101	1,867,502	311,328	143,147	396,773	182,416	4,761,274	15.6
Total Linerboard	2,924,140	1,076,705	231,158	84,718	289,316	104,315	3,471,793	14.6
Bleached Kraft Linerboard	335,444	150,819	29,695	13,143	38,942	16,413	467,302	18.5
Unbleached Kraft Linerbd	2,588,697	925,886	201,463	71,575	250,374	87,902	3,004,492	14.1
Other Unbleached Kraft	253,945	144,169	23,356	14,548	30,699	18,124	368,032	28.1
Other Bleached Kraft	764,550	628,859	51,995	42,405	72,220	56,295	866,638	12.2
Semi-Chemical Corrugating	50,498	17,769	4,820	1,476	4,568	1,663	54,811	72.0
Recycled Paperboard	226,596	120,643	14,124	8,353	23,402	13,275	280,822	25.1
Convtd Paper&Paperbd Products	1,047,768	1,585,435	84,417	123,682	101,222	146,261	1,214,664	15.2
Paper Products, Total	440,793	1,012,642	38,177	81,233	40,777	90,939	489,323	21.8
Paperboard Products, Total	606,975	572,793	46,240	42,449	60,445	55,323	725,341	11.1
Wet Machine Board	487	232	0	0	26	31	310	-44.6
Construction Paper & Board E	9,384	6,262	1,089	662	3,850	1,519	46,195	647.1
Notes								
Other: No Weight Avail. ($000)		49,964		3,393		4,188	50,259	21.6
Total Exports Incl. Other($000)		9,125,306		699,388		788,467	9,461,989	5.8

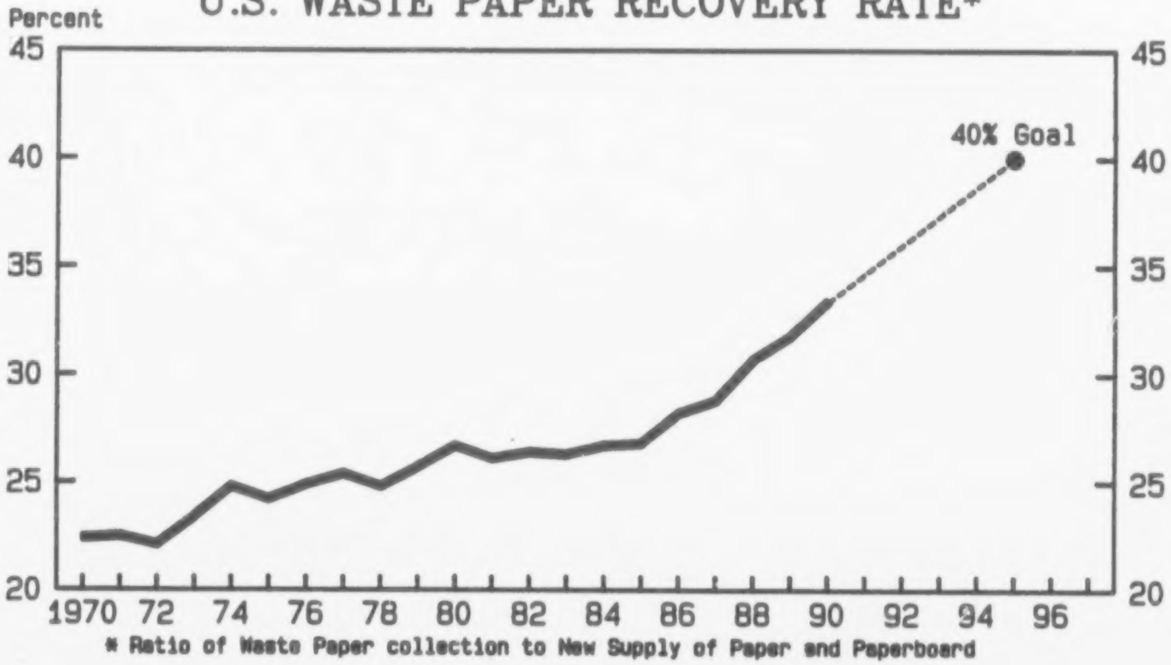
SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year–To–Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		NOV	DEC	JAN	FEB	Annual Rate Y-T-D	% Change from same Period Last Year
	1989	1990	1990	1990	1991	1991	1991	
Pulp, Paper and Products except Building Grades	132.4	132.9	133.0	132.9	132.4	132.5	132.5	–0.7
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	133.1	132.9	132.4	132.4	132.4	–0.5
Total Wood Pulp	157.4	151.8	145.7	144.7	133.5	132.9	133.2	-16.6
Total Paper	129.6	128.8	130.2	129.9	130.4	130.5	130.5	2.1
Writing Paper, exc. Newsprint	130.5	129.2	130.7	130.1	130.0	129.7	129.9	1.4
Newsprint	122.5	119.6	122.2	122.2	125.7	126.8	126.3	8.7
Total Paperboard	140.1	135.9	135.0	133.9	132.7	132.1	132.4	–4.8
Total Paper and Paperboard *	132.9	131.0	131.7	131.2	131.1	131.0	131.1	–0.2
Converted Products	131.7	135.1	135.8	135.9	136.0	136.1	136.1	1.2
Waste Paper	157.1	138.4	129.0	131.4	131.8	135.6	133.7	-11.3
All Commodities	112.2	116.3	120.1	118.6	118.9	117.2	118.1	3.0
Industrial Commodities	111.6	115.8	120.6	118.9	119.3	117.2	118.3	3.9

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

U.S. WASTE PAPER RECOVERY RATE*



* Ratio of Waste Paper collection to New Supply of Paper and Paperboard

Total boxboard production was only slightly above its year-ago level in the first two months of 1991 as strong gains in production of packaging boxboard for domestic use and production for export were offset by declines in the non-packaging boxboard grades. Production of gypsum wallboard facing, for example, which is closely tied to residential construction, was down 25% -- 45,000 tons -- from its year-ago rate.

Production of folding boxboard for domestic use showed a remarkable 6.4% gain from its comparable 1990 base. Much of this, however, was concentrated in the unbleached kraft grades, where the year-ago production total had been particularly low. The solid bleached grades were up only fractionally, reflecting a shift to recycled paperboard. At the same time, production of milk carton and food service paperboard for domestic use -- which is made entirely from bleached kraft paperboard -- increased 9%.

FIBROUS RAW MATERIALS

Growth in the use of recovered (waste) paper in the paper-making furnish continues to outpace that of wood pulp. Data for the January 1991 show consumption of recovered paper at paper and paperboard mills up 5.2% from its January 1990 total; wood pulp up 3.1%. Available data on recovered paper consumption in February 1991 indicate a 5.3% gain in consumption for the first two months of the year. Note: the 1989-1991 data on wood pulp consumption at paper and paperboard mills have been adjusted to conform to the 1989 levels recently reported by the Department of Commerce.

MARKET WOOD PULP

The rate of chemical paper grade market wood pulp production strengthened in February, bringing the two-month 1991 total up 4.6% from 1990. The operating rate surged to 99% in February from the 92% reported for January. Similar gains were reported for the other major market pulp producing countries.

The gain in the rate of U.S. production of market pulp was accompanied by a minor increase in producers' inventories, and the February rate of shipments was up sharply from January. The increase was concentrated in exports; demand for domestic market pulp declined in both absolute and workday-adjusted terms. Even with the February reduction, the two-month 1991 domestic market demand total was about 1% above that of one year ago.

Among the export markets, the major increases from the first two months of 1990 to the comparable 1991 period were in shipments to Western Europe (42% of total exports vs. 40% a year ago) with a 34% gain. The tonnage to Japan (accounting for 20%) increased by 37%, the other Asian/African countries (22%) posted an 18% increase.

PRODUCTIVITY

The Bureau of Labor Statistics has just released new data on output per employee hour for all employees and for production workers for the 1947-1989 period. The new report changed the base year of this study from 1977 to 1982.

API previously estimated a small gain in output per manhour from 1988 to 1989 for both all employees and production workers; the new data report a small decline. The lower BLS figure reflected a 0.3% decline in output, where the API data show a 0.4% increase.

The table on the attached Industry Data Sheet reports the BLS' 1989 index, together with API estimates for 1990 and January 1991. The report indicates a 1.7% increase in output per employee hour and in output per production worker manhour from 1989 to 1990, with small increases from January 1990 to January 1991.

These gains are well below the longer term productivity increases. Over the entire 1947-1989 period, for example, output per employee hour rose at an average annual rate of 3.7%; output per production worker manhour, 4.0%. In the shorter span of 1984 to 1989, the annual average gain in both manhour trends was 3.5% per year. The January 1991 index of output per employee hour is 3.0% above its 1988 level; output per production worker manhour gained 2.1% in this period. These lower productivity gains largely reflect the relatively flat trend of paper and paperboard production evident since mid-1988 together with the fairly steady rate of paper industry employment.

Statistical Note: The data on employment at pulp, paper and paperboard mills reported on the Industry Data Sheet and for 1989 and 1990 and on Page 14 of the February 1991 Paper, Paperboard and Wood Pulp Monthly Statistical Summary have been corrected to include employment at pulp mills that do not have papermaking facilities (SIC Code 2611). We regret any inconvenience this may have caused.

RECOVERED (WASTE) PAPER

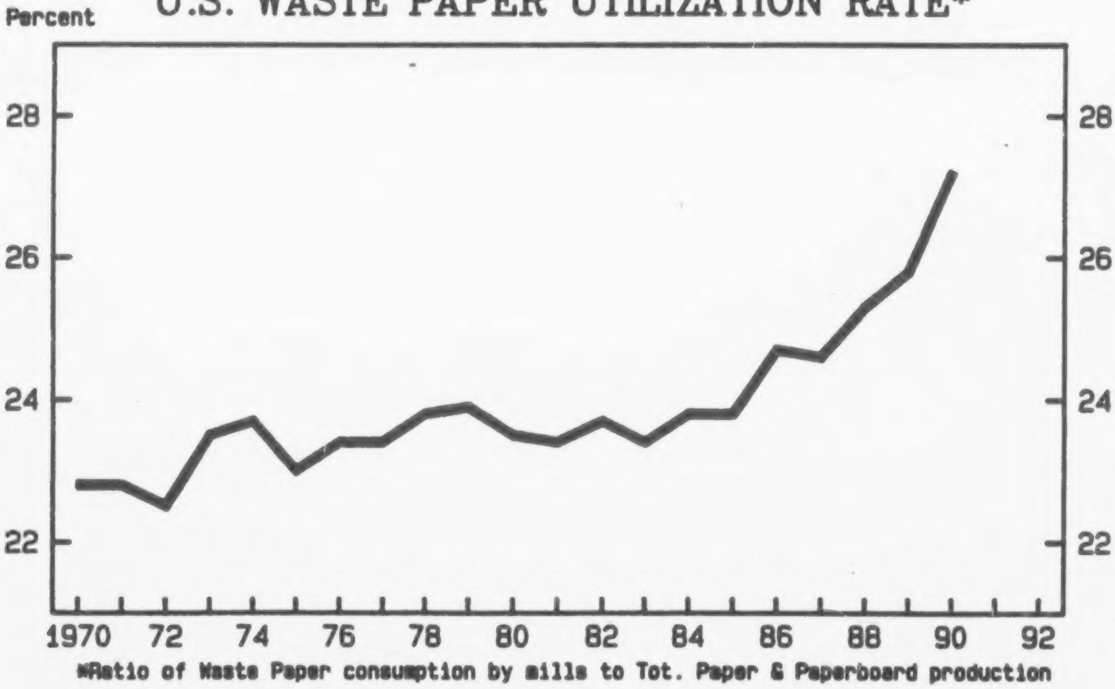
Overview: Paper recovery for domestic use and export has increased dramatically since the early 1970's, with much of the progress taking place during the past five years. Measured as a percentage of new supply (domestic production plus imports minus exports), recovery of paper and paperboard rose from 22.4% in 1970 to 33.4% in 1990. (See chart on page 10). The rate of increase averaged 0.3 percentage points a year from 1970 to 1985 and then accelerated to 1.3 percentage points a year from 1985 to 1990. If the rapid progress of the past five years is sustained, the U.S. paper industry will succeed in meeting its 1995 goal of 40% recovery.

All of the major waste paper grades contributed to the aggregate recovery gains. As the number of curbside collection programs proliferated, the recovery rate for old newspapers (ONP) climbed from 30% in 1985 to nearly 45% last year. Containerboard's recovery rate advanced from 45.5% in 1985 to 54% last year. If converting scrap is excluded, the recovery rate for containerboard stood at just over 50% in 1990, suggesting that one of every two corrugated containers were recovered.

Recovery of mixed paper, a broad category encompassing various paper products recovered from offices, homes, and other establishments, increased at average annual rate of 6.3% from 1985 to 1990. During the same period, recovery of the high grades -- pulp substitutes and the deinking grades -- increased at average yearly rate of 6.2%.

Domestic Use: Consumption of recovered paper by U.S. mills grew at an average annual rate of 3.1% from 1970 to 1990, reaching 21.8 million short tons. During the same period, production of paper and paperboard (including wet machine board and the construction grades) trended up 2.2% a year to 80.1 million short tons. The utilization rate -- defined as the ratio of recovered paper consumption by mills to total paper and paperboard production -- edged up from 22.8% in 1970 to 23.8% in 1985 and then moved up more rapidly to reach 27.2% in 1990. (See chart below.)

U.S. WASTE PAPER UTILIZATION RATE*



*Ratio of Waste Paper consumption by mills to Tot. Paper & Paperboard production

The paperboard grades accounted for 67% of the paper industry's total recovered paper consumption in 1990. Consumption of recovered paper in the production of kraft linerboard expanded at an average rate of 16.2% a year from 1985 to 1990. Recovered paper consumption also expanded rapidly in semichemical medium. Growth in recycled containerboard production -- corrugating medium and linerboard -- made a major contribution to the increased use of recovered paper at paperboard mills.

Among the paper grades, tissue and newsprint were the leading users of recovered paper in 1990. Consumption of recovered paper by tissue mills expanded at an average annual rate of 8.1% from 1985 to 1990. During the same period, the use of recovered paper in the manufacture of newsprint and printing-writing papers rose at average annual rate of 6.6% and 6.5%, respectively.

While paper and paperboard mills accounted for nearly 97% of domestic waste paper consumption in 1990, some 750,000 short tons of waste paper -- mainly old newspapers -- were used outside the industry. These non-paper industry uses include packaging such as molded pulp for egg cartons, molded trays and other applications; cellulose insulation; cushioning materials; roadside mulch and animal bedding.

Export Patterns: U.S. exports of recovered paper expanded dramatically during the past two decades, rising from just 408,000 short tons in 1970 to 6.5 million short tons in 1990, a nearly sixteen-fold increase. During the most recent five-year period, waste paper exports grew at an average annual rate of 12.8%.

The largest export grade is old corrugated containers (OCC), which accounted for 42% of total U.S. exports of recovered paper last year. Old newspapers accounted for 19% of the total, and high- grade deinking and pulp substitutes comprised 21%. The remaining 18% was accounted for by mixed papers.

The Republic of Korea, Taiwan, Mexico, Japan, Canada, Indonesia and Spain, in that order, were the principal importers of U.S. recovered paper in 1990. The regional distribution of U.S. waste paper exports has changed significantly during the past decade, with Asian nations accounting for an increasingly larger share. For instance, the Far East and Oceania (including the People's Republic of China) expanded its share of U.S. waste paper exports to 50.5% in 1990, up from 35.5% ten years earlier. Japan's share advanced from 7.6% to 11.6%. By contrast, the respective shares of Western Europe, Canada, Mexico, and Latin America have declined since 1980.

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 3
MARCH, 1991

PRODUCTION (000 TONS)

	(P) FEB 1991	(R) JAN 1991	FEB 1990	FIRST 2 MONTHS 1991	FIRST 2 MONTHS 1990	% CHANGE YR TO DATE 1991/1990
PAPER GRADES						
Newsprint	522	576	510	1,098	1,063	3.3
Printing & Writing	1,662	1,889	1,794	3,551	3,739	-5.0
Uncoated Groundwood (s)	132	145	141	276	296	-6.7
Coated Groundwood (s)	314	352	324	665	684	-2.8
Coated Free Sheet (s)	251	281	259	532	548	-3.0
Total Coated Paper (s)	564	633	584	1,197	1,233	-2.9
Uncoated Free Sheet Paper (s)	846	982	935	1,828	1,935	-5.5
Thin Paper (s)	17	20	22	37	46	-20.2
Cotton Fiber Paper (s)	11	13	14	24	28	-13.0
Bleached Bristols (s)	91	97	98	188	202	-6.7
Tissue Paper	438	485	452	923	925	-0.2
Total Pkg & Other Paper	360	388	359	748	759	-1.3
Unbl. Kraft Paper (s)	186	202	185	388	400	-3.1
Bl. Kraft Paper (s)	36	35	41	71	84	-15.4
Specialty Pkg. Paper	46	53	40	98	86	13.7
Special Industrial Paper (s)	93	99	93	192	189	1.7
TOTAL PAPER	2,981	3,339	3,114	6,321	6,486	-2.6
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,624	1,823	1,536	3,447	3,223	7.0
Unbleached Kraft Linerboard	1,511	1,708	1,444	3,220	3,029	6.3
Other Unbl. Kraft Paperboard	113	115	92	228	193	17.8
Semichemical Paperboard	453	499	430	951	920	3.5
Bleached Paperboard	359	393	356	752	739	1.7
Recycled Paperboard	677	751	677	1,428	1,429	-0.1
TOTAL PAPERBOARD	3,113	3,465	2,998	6,578	6,311	4.2
TOTAL PAPER AND PAPERBOARD	6,094	6,804	6,112	12,899	12,797	0.8

	JAN 1991	DEC 1990	JAN 1990	FULL YEAR 1990	FULL YEAR 1989	% CHANGE FULL YEARS 1990/1989
Dissolving & Special Alpha	115	123	125	1,293	1,425	-9.3
Bleached Sulfite) Unbleached Sulfite)	129	132	125	1,561	1,563	-0.2
Bleached & Semi-Bl. Sulfate	2,394	2,360	2,385	27,559	26,949	2.3
Unbleached Sulfate	1,969	1,900	1,893	22,072	21,669	1.9
Semichemical Groundwood & Thermomechanical	563	554	539	6,363	6,029	5.5
TOTAL PULP DIVISION DATA	5,541	5,428	5,441	63,068	61,998	1.7

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA March 29, 1991	1989	1990	1990	1990 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD --- Tons (000)			DECEMBER	JANUARY	FEBRUARY		
Total Production (API)..............: excluding :......................	76,722	78,568	6,502	6,804	6,094	77,393	0.8
Total Seasonally Adjusted..........: construction :......................			6,589	6,607	6,459	78,397	0.7
Imports (including Products).......: and wet :.....E......................	12,910	13,006	988	1,120	1,080	13,080	1.8
Exports (including Products).......: machine :.....E......................	6,263	6,787	523	586	550	6,870	6.0
Apparent Consumption...............: grades :......................	83,369	84,787	7,054	7,132	6,989	84,607	0.5
Paper Production % Tonnage Capacity..............................	93.0	93.4	88.1	91.3	89.8	90.6	-
Paperboard Production % Tonnage Capacity..............................	93.8	93.6	92.1	95.4	94.7	95.1	-
PAPER, PAPERBOARD AND PRODUCTS			NOVEMBER	DECEMBER	JANUARY		
Imports.....:Including Construction and :..............................	13,100	13,147	1,061	994	1,112	13,344	-1.0
Exports.....: WMB Grades (excl. HPB) :..............................	6,300	6,796	547	524	650	7,803	11.8
MARKET WOOD PULP PRODUCTION – Tons (000)..............................	8,884	8,798	672	737	763	9,155	-1.3
TOTAL WOOD PULP PRODUCTION – Tons (000)..............................	61,998 f	63,086 f	5,123	5,426	5,541	66,491	1.8
WOOD PULP IMPORTS – TONS (000)..............................	5,005	4,893	390	329	423	5,073	2.4
WOOD PULP EXPORTS – TONS (000)..............................	6,231	5,905	436	477	475	5,706	13.2
RAW MATERIALS CONSUMPTION – Tons (000)							
PAPER AND BOARD MILLS....: excluding :......................			NOVEMBER	DECEMBER	JANUARY		
Wood Pulp..............................: consumption for :......................	60,252 R	61,032 R	5,006	5,129	5,399	64,788	3.1
Waste Paper..............................: construction & :......................	19,490	21,036	1,778	1,722	1,833	21,996	5.2
TOTAL..............................: WMB grades :......................	79,742	82,067	6,786	6,851	7,232	86,783	3.7
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	98,414	99,109	8,120	8,012	8,801	105,612	2.9
EMPLOYMENT (000)			NOVEMBER	DECEMBER	JANUARY		
Paper and Allied Products.........Total..............................	697.1	696.4	696.3	694.9	690.4	690.4	-0.5
Pulp, Paper and Board Mills........Total......A..............................	246.0	246.3	244.0	244.6	244.5	244.5	-0.5
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			NOVEMBER	DECEMBER	JANUARY		
Paper and Allied Products..............................	11.96	12.30	12.53	12.54	12.51	12.51	3.3
Pulp, Paper Mills.......A..............................	14.73	15.20	15.58	15.43	15.31	15.31	3.0
Paperboard Mills........E..............................	14.76	15.25	15.75	15.69	15.57	15.57	3.9
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q2	1990 Q3	1990 Q4		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.84 Y	18.59	16.74	14.46	N.M.	N.M.
INDEX OF OUTPUT PER MAN–HOUR (1982=100)			NOVEMBER	DECEMBER	JANUARY		
:IN PULP, PAPER :...Production Workers..............................	126.0 RS	128.1	128.6	130.3	130.3	130.3	0.8
:AND BOARD MILLS:...All Employees..............................	126.6 RS	128.8	129.8	131.5	131.5	131.5	1.4
PAPER AND ALLIED PRODUCTS (Million $)			NOVEMBER	DECEMBER	JANUARY		
Industry Shipments (Dept. of Commerce)*..............................	130,501	131,080	10,892	10,692	10,521	126,252	-1.5
Pulp, Paper and Paperboard*..............................	57,700	58,356	4,727	4,608	4,507	54,084	-1.0
Inventories (End of Period) – Total Industry*..............................	12,571	12,980	12,787	12,980	13,068	13,068	2.7
Pulp, Paper and Paperboard*..............................	4,980	5,305	5,233	5,305	5,292	5,292	5.9
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q1	1990 Q2	1990 Q3		
Sales (Corporations Only)..............................	113,573	114,987 #	28,534	28,844	28,862	N.M.	N.M.
Earnings (Corporations Only)..............................	7,047	5,687 #	1,389	1,630	1,246	N.M.	N.M.
Depreciation (Corporations Only)..............................	5,010	5,424 #	1,347	1,341	1,380	N.M.	N.M.
Net Worth (Corporations Only)..............................	45,642	46,185 #	46,519	45,597	46,185	N.M.	N.M.
PRICE INDEXES (Bureau of Labor Stats)1982=100			DECEMBER	JANUARY	FEBRUARY		
Pulp, Paper & Products, ex. Building Grades..............................	132.4	132.9	132.9	132.4	132.5	132.5	-0.7
Wood Pulp..............................	157.4	151.8	144.7	133.5	132.9	133.2	-16.6
Waste Paper..............................	157.1	138.4	131.4	131.8	135.6	133.7	-11.3
Paper..............................	129.6	128.8	129.9	130.4	130.5	130.5	2.1
Paperboard..............................	140.1	136.9	133.9	132.7	132.1	132.4	-4.8
PAPER DEMAND (INDEXED: 1987=100)			DECEMBER	JANUARY	FEBRUARY		
Total Paper Production *..............................	103.5	106.7	103.8	105.7	102.5	104.1	-2.6
Paper New Supply *..............................	102.2	104.6	100.2	104.3	101.6	102.9	-1.9
Demand Indicators – (Weighted Average) *..............................	107.8	110.1	110.7	110.1	109.8	110.0	0.0
Production of Nondurable Goods..........*....(21.2%)..............................	108.4	107.8	107.2	106.8	106.5	106.7	-1.2
Disposable Income..........*....(23.9%)..............................	107.2	108.1	107.7	106.8	106.7	106.7	1.8
Total Printing and Publishing..........*....(54.9%)..............................	108.6	112.0	113.3	112.9	112.4	112.7	1.1
PAPERBOARD DEMAND (INDEXED: 1987=100)			DECEMBER	JANUARY	FEBRUARY		
Total Paperboard Production *..............................	102.6	104.5	108.8	107.5	106.0	106.7	4.2
Production for Domestic Use	102.7	103.7	106.0	106.0	104.0	105.0	3.8
Demand Indicators – (Weighted Average) *..............................	107.2	107.9	105.9	105.6	104.7	105.1	-1.7
Production of Consumer Goods..........*....(62.06%)..............................	108.6	107.3	105.5	105.4	104.6	105.0	-1.4
Production of Equipment..........*....(5.75%)..............................	112.3	115.5	113.9	113.9	112.7	113.9	-0.4
Production of Materials..........*....(32.19%)..............................	107.4	107.8	105.2	104.5	103.4	104.0	-2.5
MARKET DATA			NOVEMBER	DECEMBER	JANUARY		
Consumption by Publishers – Tons (000)..............................	13,493	13,399	1,135	1,114	1,039	12,474	-2.4
Newspaper Pub. and Printing Empl. Total(000)..............................	473	478	478	477	472	5,862	-0.8
Magazine Advertising Pages (PIB, Inc.)	181,985	173,582	16,917	15,202	8,541	114,498	-10.5
Wholesalers Sales and Inventories (Million $)			NOVEMBER	DECEMBER	JANUARY		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales..............................	50,740	52,408	4,357	4,018	4,489	53,628	1.8
Inventories (End of Period)..............................	4,137	4,305	4,276	4,305	4,332	51,984	3.9
FIBRE BOX DATA (Fibre Box Association)			DECEMBER	JANUARY	FEBRUARY		
Fibre Box Shipments (Million square feet)..............................	313,400	315,775	21,412	27,227	23,880	308,702	-1.3
Container'bd Inventory at Mill & Plant (000 Tons)..............................	2,589	2,765	2,765	3,044	3,048	3,048	18.1
RETAIL TRADE (Billion $)							
Total Retail Sales *..............................	1,711	1,790	148.8	147.6	148.9	1,779	-1.1
Nondurable Goods Stores Sales *..............................	1,062	1,152	97.3	96.8	96.8	1,162	2.7
GENERAL ECONOMIC DATA			DECEMBER	JANUARY	FEBRUARY		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*..............................	108.1	109.2	107.2	108.6	105.7	108.2	-1.7
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)..............................	112.2	116.3	118.6	118.9	117.2	118.1	3.0
CONSUMER PRICES (ALL ITEMS–URBAN CON.) (1982–4=100)..............................	124.0	130.7	133.8	134.6	134.8	134.7	6.5
GROSS NATIONAL PRODUCT – ANNUAL RATE (Billions$)			1990 Q2	1990 Q3	1990 Q4		
G.N.P. or Expenditure – Current $..............................	5,201	5,465	5,443	5,515	5,527	N.M.	N.M.
G.N.P. or Expenditure – 1982 $..............................	4,118	4,157	4,166	4,170	4,153	N.M.	N.M.
PAPER AND PAPERBOARD CONSUMPTION – POUNDS PER CAPITA	670	679		N.M. – Not meaningful		680	

f – Wood Pulp Proj exc del., explo & scr. R – Revised RS – Revised series E – Last month estimated by API A – Est. by API Y – Full year est. by Dept. of Commerce * Seasonally Adjusted # 3–qtr. annual rate

A2500-2

Paper, Paperboard & Wood Pulp

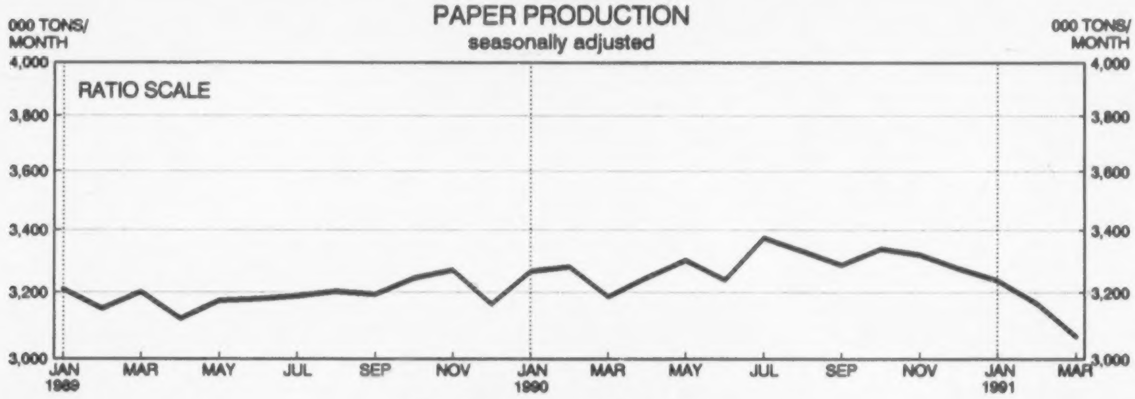
MONTHLY STATISTICAL SUMMARY - Vol.69 No.4 APRIL 1991

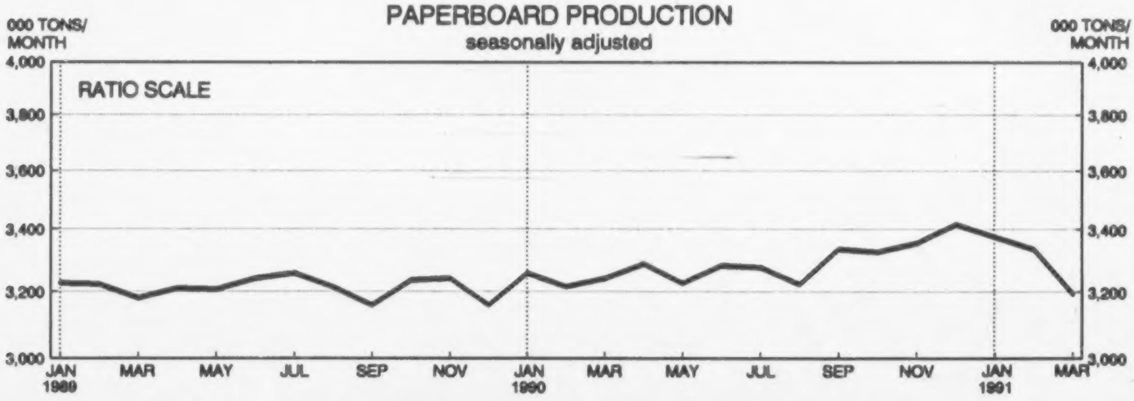
PAPER AND PAPERBOARD PRODUCTION, FIRST QUARTER 1991: DEMAND WEAKNESS

Total production of paper and paperboard trended downward throughout the first quarter of this year. The seasonally adjusted March 1991 rate was 6.4% below its December 1990 high and 2.6% under its year-ago level. The first quarter 1991 total, however, was within 0.4% of its comparable 1990 rate.

The weakness in the reported data was centered on the paper grades, which came in 2.7% below their corresponding 1990 total. Paperboard production gained 1.9%, although here, too, the seasonally adjusted data moved steadily downward during the 1991 quarter.

The charts below present seasonally adjusted monthly rates of paper and paperboard production from January 1989 through March 1991. A ratio scale is used, so that, for example, the distance from 3.4 to 3.2 million tons represents a decline of 5.9%.





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Paper: The current recession has had a particularly strong impact on the printing-writing papers, driving first quarter 1991 shipments 5.8% below their year-ago total. The uncoated groundwood, coated free sheet and bleached bristols grades showed declines below this average (see table on page 3), but output of the other grades -- thin, cotton fiber and uncoated free sheet papers -- fell more steeply.

All major consumers reduced their paper demands in the first quarter of 1991. The largest declines occurred in shipments to magazine publishers, business forms converters and envelope converters. Commercial printers, office reprographics (this category includes office copy paper) and book publishers made modest reductions in their requirements.

With the exception of the bleached kraft grades, output of the other paper grades held up fairly well. Tissue paper production, for example, was up slightly while newsprint production gained 4.1%. Newsprint consumption, however, was 6.2% below its year-ago rate in the first two months of 1991. Inventories of newsprint at publishers rose to 44 days of supply as of the end of February, from 41 days in December 1990 and 37 days in February 1990.

Bleached kraft paper shipments were down 13% in the first quarter of 1991 from the comparable 1990 quarter. This was not so much an effect of the business cycle as it was the result of a major user shifting his requirements from bleached kraft to recycled paper bags.

Shipments of unbleached kraft paper from domestic mills were down by 0.9%. When net imports and consumption of bags made from recycled papers are included, the total new supply of these papers gained 3.8%.

Paperboard: Production of containerboard for domestic packaging use was 1.7% ahead of its corresponding 1990 total in the first quarter of 1991, but the month-to-month comparisons point to demand decline. The January 1991 total, for example, while 5% above its year-ago total, was supported by a 337,000-ton increase in inventories of containerboard at mills and boxplants. Boxplant inventories declined slightly in February and March, largely offset by increases in mill inventories. March 1991 containerboard production for domestic use was 4% below that of March 1990, even with the increase in mill inventories.

Shipments of fiber boxes, which had held close to their year-earlier totals in January and February 1991, fell 8.9% below their March 1990 level in March 1991, bringing first quarter 1991 shipments 3.8% below those of the first quarter of 1990.

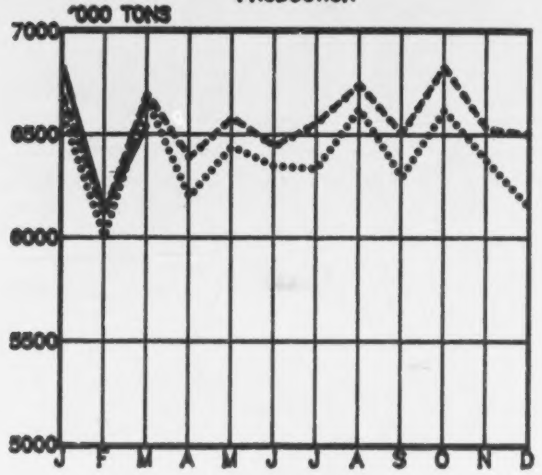
The weakness in box demand was in line with market trends. The weighted average of the paperboard demand indicators presented on the attached Industry Data Sheet was 1.9% below its year-ago rate in the first quarter of 1991, with total consumer goods output off 1.7% and production of materials down 2.6%.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		DEC	JAN	FEB (R)	MAR (P)	Annual Rate Y-T-D	% Change From Same Period
	1989	1990	1990	1991	1991	1991	1991	Last Year
PAPER								
Newsprint – Production	6,088	6,615	576	576	522	574	6,686	4.1
– Shipments	6,079	6,628	576	581	513	574	6,672	3.8
Printing & Writing: Total Shipments	21,626	22,381	1,763	1,892	1,665	1,768	21,297	–5.8
Groundwood Paper – Shipments	1,743	1,768	147	145	133	147	1,696	–4.7
– New Orders	1,741	1,834	161	171	126	153	1,800	2.8
– Unshipped Orders	193	168	215	234	231	224	224	33.9
Coated Groundwood – Shipments	4,059	4,214	327	352	314	330	3,984	–3.0
Coated Free Sheet – Shipments	3,157	3,307	237	283	251	258	3,171	–4.5
Total Coated Papers – Shipments	7,215	7,521	564	635	565	588	7,155	–3.7
– New Orders	7,171	7,423	531	509	493	568	6,719	–5.1
– Unshipped Orders	706	602	591	534	477	475	475	–21.2
Uncld Free Sheet – Shipments	11,081	11,510	930	982	846	896	10,898	–6.8
– New Orders	11,097	11,499	862	915	792	881	10,351	–11.9
– Unshipped Orders	748	756	685	597	564	518	518	–31.5
Thin Papers – Shipments	262	234	14	20	17	18	219	–25.5
Cotton Fiber Paper – Shipments	161	161	11	13	11	13	150	–13.5
Bleached Bristols – Shipments	1,164	1,188	96	97	92	106	1,179	–4.9
Tissue Paper – Production	5,636	5,802	484	485	459	485	5,718	0.3
Total Packaging & Other Paper	4,916	4,613	357	388	360	390	4,553	–0.6
Unbl. Kraft Paper – Shipments	2,681	2,377	173	202	186	202	2,360	–0.9
Bl. Kraft Paper – Shipments	468	484	37	35	36	36	426	–13.1
Specialty Pkg. Paper – Production	520	563	51	53	46	50	591	10.5
Special Industrial Paper – Shipments	1,248	1,190	97	99	93	102	1,176	0.2
TOTAL PAPER PRODUCTION – UNADJUSTED	38,266	39,411	3,181	3,341	3,006	3,217	38,254	–2.7
TOTAL PAPER PRODUCTION – SEAS ADJ			3,276	3,238	3,167	3,066	37,885	–2.7
PAPERBOARD – PRODUCTION #								
Containerboard	26,428	27,388	2,384	2,432	2,172	2,280	27,532	2.9
Cont'bd For Dom Use for Fibre Boxes	23,752	24,432	2,073	2,164	1,900	1,964	24,114	1.7
Total Linerboard	16,399	16,875	1,424	1,503	1,307	1,345	16,617	2.3
Unbleached Kraft	15,833	16,414	1,386	1,454	1,260	1,282	15,984	0.9
Solid Bleached	178	139	11	12	10	13	142	–3.8
Recycled	388	323	28	36	36	50	491	83.7
Corrugating Medium	7,339	7,549	649	661	592	618	7,485	0.4
Semichemical	5,554	5,567	480	489	434	454	5,506	0.6
Recycled	1,785	1,982	169	172	158	164	1,978	0.0
Container Chip and Filler	14	7	0	0	1	2	13	3.2
Other Containerboard for Dom Use	307	282	24	23	21	26	276	2.2
Containerboard for Export	2,369	2,674	287	245	251	290	3,142	13.7
Boxboard	12,092	12,035	955	1,048	954	1,044	12,186	–0.4
Boxboard for Packaging for Dom Use	7,076	6,949	574	636	578	634	7,392	5.0
Folding Boxboard	5,370	5,198	443	477	440	480	5,588	5.6
Solid Bleached	1,980	1,818	158	166	148	160	1,894	–0.6
Unbleached Kraft	987	970	94	92	93	93	1,111	16.9
Recycled	2,403	2,410	191	219	199	227	2,583	6.1
Set-up Boxboard for Dom Use	288	290	18	23	22	23	272	–13.5
Milk Carton & Food Service Dom Use	1,419	1,461	113	136	117	131	1,532	6.7
Other Boxboard for Domestic Use	4,152	4,145	297	330	291	316	3,747	–10.8
Boxboard for Export	863	941	84	83	86	94	1,047	4.9
Paperboard Production by Furnish	38,456	39,423	3,339	3,480	3,126	3,324	39,718	1.9
Unbleached Kraft	19,490	20,357	1,795	1,823	1,624	1,701	20,593	3.8
Semichemical	5,691	5,710	494	499	453	469	5,681	1.1
Solid Bleached Kraft	4,521	4,399	370	391	359	387	4,550	0.5
Recycled	8,754	8,956	680	767	690	767	8,894	–1.1
Paperboard Production for Export	3,232	3,608	370	328	336	383	4,190	11.6
Unbleached Kraft	2,363	2,678	289	254	251	300	3,223	16.2
Semichemical	138	143	14	10	18	15	175	18.5
Bleached Kraft	693	734	64	58	64	63	738	–6.4
Recycled	38	52	3	6	3	5	54	22.7
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,519	39,423	3,339	3,480	3,126	3,324	39,718	1.9
TOTAL PAPERBOARD PROD – SEAS ADJ			3,417	3,375	3,336	3,196	39,628	1.9
PAPER AND PAPERBOARD – UNADJ	76,785	78,834	6,520	6,821	6,131	6,540	77,971	–0.4
PAPER AND PAPERBOARD – SEAS ADJ			6,693	6,613	6,503	6,262	77,513	–0.4

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted # – Data Revised per Annual Audit

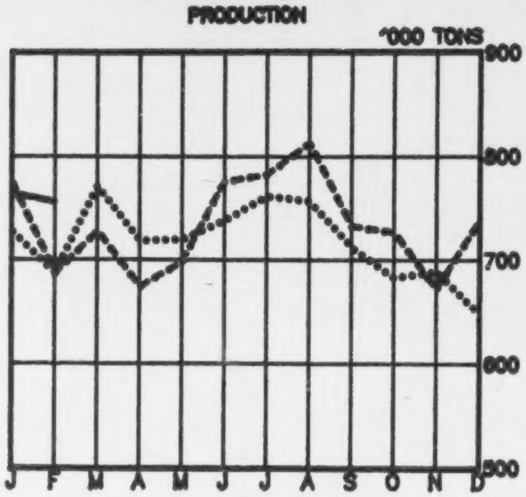
TOTAL PAPER AND PAPERBOARD

PRODUCTION



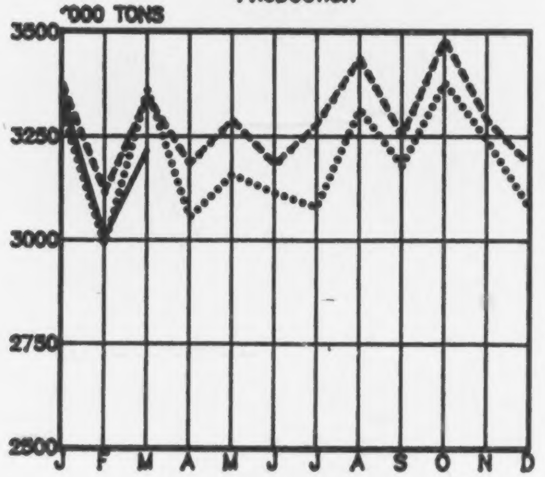
MARKET WOOD PULP

PRODUCTION



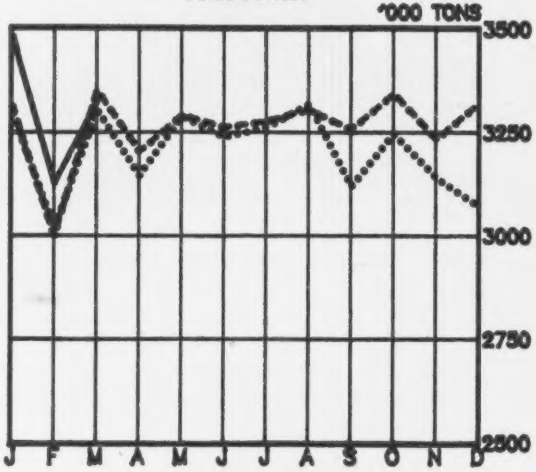
TOTAL PAPER

PRODUCTION



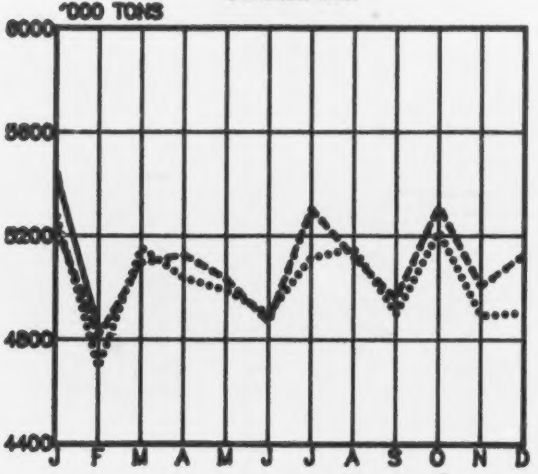
TOTAL PAPERBOARD

PRODUCTION



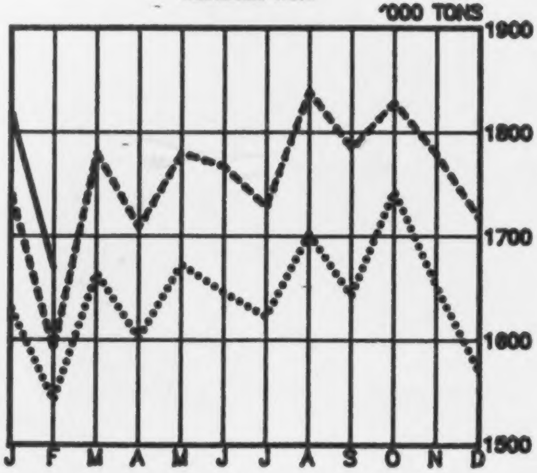
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 ········ 1990 ------ 1991 ———

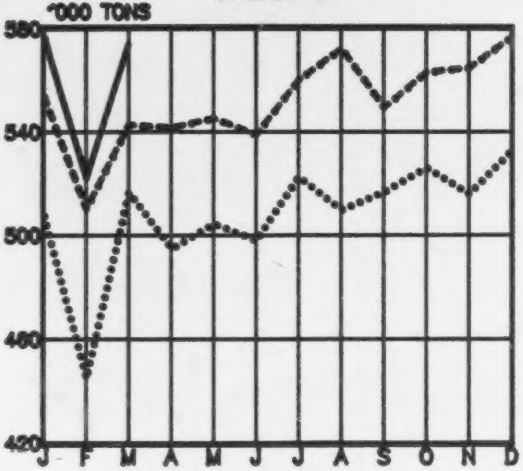
WOOD PULP STATISTICS (Thousands of Tons)		YEAR 1989	1990	NOV 1990	DEC 1990	JAN (R) 1991	FEB (P) 1991	Annual Rate Y-T-D 1991	% Change From Same Period Last Year
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,998	63,068	5,123	5,428	5,579	5,033	63,672	2.1
	Imports A	5,005	4,893	390	329	423	430	5,118	1.9
	Exports	6,231	5,905	438	477	475	485	5,765	15.7
	New Supply	60,772	62,056	5,075	5,280	5,526	4,978	63,025	1.0
Dissolving Pulp	Production	1,425	1,293	71	123	115	104	1,314	2.2
	Imports	284	222	20	23	10	18	165	-26.4
	Exports	836	782	57	68	52	64	698	5.7
	New Supply	873	733	34	77	73	58	781	-8.1
Paper Grades Chemical Pulp	Production	50,181	51,192	4,163	4,392	4,530	4,098	51,764	2.2
	Imports A	4,370	4,326	348	293	387	386	4,637	4.4
	Exports	5,325	5,080	378	404	422	418	5,044	18.2
	New Supply	49,226	50,438	4,132	4,280	4,494	4,065	51,358	1.1
Groundwood and Thermo-Mech	Production	6,029	6,363	543	554	563	503	6,397	2.6
	Imports A	351	345	22	14	26	26	315	-12.5
	Exports	70	44	3	4	1	3	24	-55.4
	New Supply	6,309	6,665	562	563	589	526	6,688	2.2
Semi-Chemical	Production	4,363	4,219	347	359	371	329	4,197	0.0
	Imports								
	Exports								
	New Supply	4,363	4,219	347	359	371	329	4,197	0.0
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,664	8,798	672	737	764	756	9,115	4.0
	Imports	3,539	3,215	257	226	256	280	3,211	-4.4
	Exports	5,309	5,561	415	530	435	477	5,472	20.2
	New Supply	6,893	6,451	514	433	584	558	6,854	-9.4
Dissolving Pulp	Production	1,422	1,292	71	123	115	104	1,313	2.1
	Imports	210	170	17	16	7	16	139	-2.9
	Exports	821	782	52	85	58	62	719	2.9
	New Supply	810	679	36	54	64	58	733	0.4
Paper Grades Chemical Pulp	Production	7,242	7,506	601	614	649	652	7,802	4.4
	Imports	3,072	2,813	225	197	229	247	2,857	-4.5
	Exports	4,489	4,779	364	446	378	415	4,753	23.3
	New Supply	5,825	5,540	462	366	500	484	5,907	-10.7
Groundwood Pulp and All Other	Production	0	0	0	0	0	0	0	0.0
	Imports RS	258	232	16	13	19	17	215	-4.3
	Exports	0	0	0	0	0	0	0	0.0
	New Supply	258	232	16	13	19	17	215	-4.0

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series.

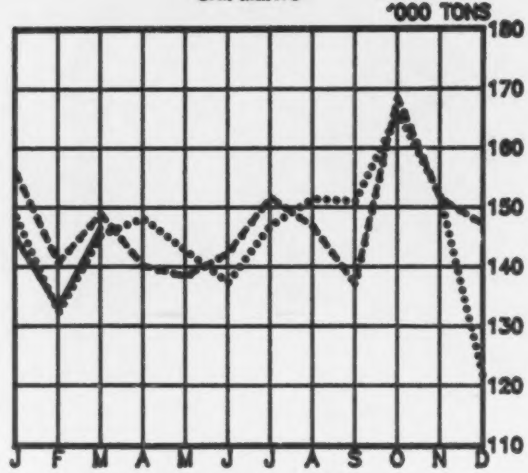
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1989	1990	NOV 1990	DEC 1990	JAN (R) 1991	FEB (P) 1991	Annual Rate 1991	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,071	6,787	6,846	7,254	6,513	82,604	2.9
Total Wood Pulp	60,252	61,032	5,008	5,129	5,437	4,845	61,691	2.3
Waste Paper	19,490	21,039 R	1,778	1,717	1,816	1,669	20,912	4.7
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	201	226	201	216	216	0.6
Producers' Market Inventories	342	476	505	476	521	552	552	4.0
Consumers' Purchased Inventories #	519	392	358	392	419	409	409	-24.6
Waste Paper at Paper & Bd. Mills	1,082	909 R	981	909	927	917	917	-12.6
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	24	23	26	27	27	-6.9

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # Includes all grades of wood pulp
P – Preliminary; R – Revised; 0 – Indicates zero to five-hundred short tons



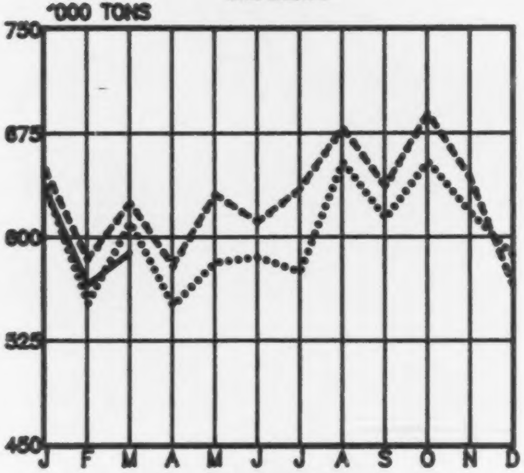
NEWSPRINT

PRODUCTION



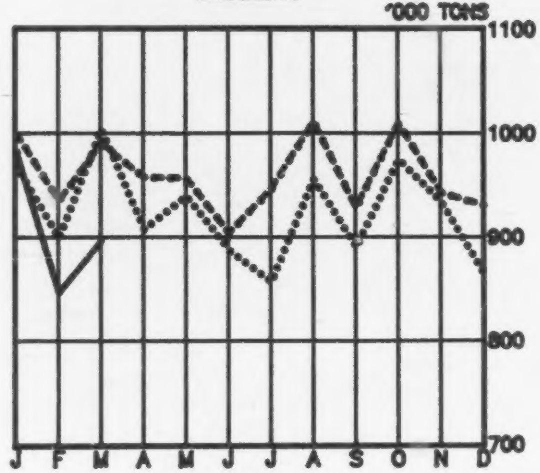
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



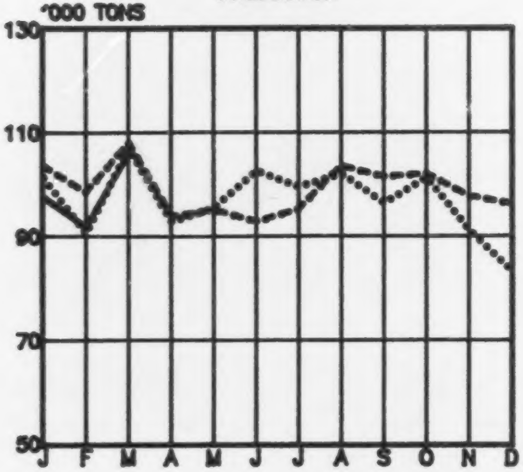
COATED PAPER

SHIPMENTS



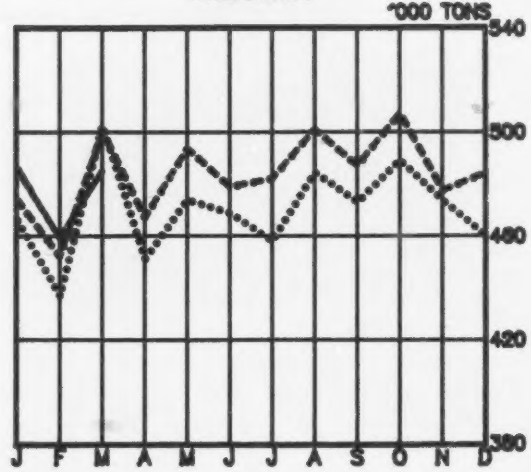
UNCOATED FREE SHEET PAPERS

SHIPMENTS



BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION

1989 ········ 1990 - - - - - 1991 ———

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1989	YEAR 1990	NOVEMBER 1990	DECEMBER 1990	JANUARY 1991	FEBRUARY 1991	ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,279	98,304	8,180	7,920	8,779	8,171	101,700	0.8
– Total Consumption	98,414	99,109	8,120	8,012	8,801	8,115	101,496	1.5
– Residues *	34,539	35,727	2,953	2,764	2,969	2,777	34,476	-3.5
– Inventories	5,462	5,961	6,375	5,961	5,732	5,554	5,554	-0.8
So. Atlantic – Total Receipts	31,982	32,836	2,816	2,598	2,792	2,631	32,538	-2.7
– Total Consumption	32,239	32,412	2,579	2,567	2,868	2,659	33,162	2.0
– Residues *	9,961	11,181	903	911	991	854	11,070	-2.5
– Inventories	936	1,334	1,324	1,334	1,257	1,291	1,291	26.9
Northeast – Total Receipts	7,242	7,264	599	597	694	655	8,094	0.6
– Total Consumption	7,072	7,080	534	558	589	590	7,074	-4.1
– Residues *	1,575	1,505	123	124	146	140	1,716	13.5
– Inventories	522	449	458	449	504	531	531	-11.4
South Central – Total Receipts	35,840	37,246	3,149	3,059	3,467	2,993	38,760	7.3
– Total Consumption	35,791	36,784	3,068	3,027	3,431	3,079	39,060	7.0
– Residues *	10,539	11,616	953	920	1,028	923	11,706	5.9
– Inventories	1,336	1,679	2,072	1,679	1,715	1,472	1,472	26.6
North Central – Total Receipts	7,020	7,074	583	598	746	709	8,742	8.1
– Total Consumption	6,963	7,129	604	605	647	597	7,464	3.5
– Residues *	1,422	1,308	121	92	93	100	1,158	-10.6
– Inventories	938	1,014	1,004	1,014	1,113	1,144	1,144	5.8
West – Total Receipts	17,186	15,184	1,233	1,068	1,076	1,183	13,556	-15.3
– Total Consumption	16,349	15,704	1,315	1,155	1,266	1,190	14,736	-9.9
– Residues *	11,042	10,217	853	717	711	760	8,826	-16.0
– Inventories	1,730	1,265	1,517	1,265	1,143	1,116	1,116	-35.4

SOURCE: American Pulpwood Association

* – Consumption of Residues in cords equivalent

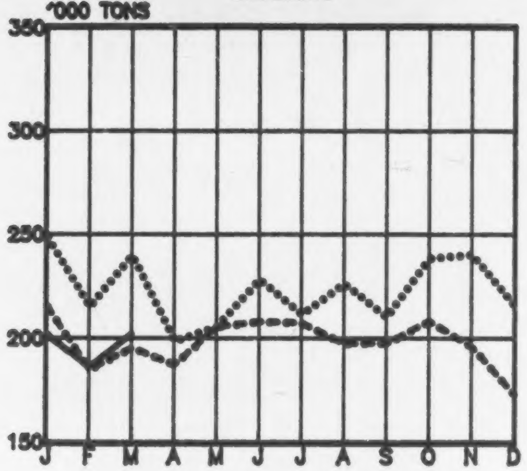
UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA * YEAR 1990 Tons	 YEAR 1990 ($000)	 JANUARY 1991 Tons	 JANUARY 1991 ($000)	 FEBRUARY 1991 Tons	 FEBRUARY 1991 ($000)	ANNUAL RATE Y-T-D 1991 Tons	% CHANGE FROM SAME PD LAST YEAR
Pulpwood, Roundwood (in cubic meters)		0	0	0	0	0	0	0	0.0
Pulpwood chips		709,197	22,413	42,863	1,306	66,638	2,090	869,005	-0.2
Wood Pulp, Total	A	4,322,418	2,514,301	392,029	196,580	341,370	169,528	4,400,393	-3.5
Waste Fibrous Materials, Total		130,452	31,442	8,109	1,812	9,840	2,134	107,693	-27.3
Paper, Board & Products, Total	A	11,191,700	6,317,590	962,774	586,889	859,022	512,797	10,930,773	-1.6
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	A	11,047,032	5,968,425	960,920	538,290	847,976	483,663	10,793,375	-1.6
Paper, Paperboard & Products	A	11,088,239	6,284,416	957,651	585,499	854,488	511,601	10,872,832	-1.1
Paper & Paperboard, Only	A	10,921,571	5,935,250	945,798	536,901	843,442	482,457	10,735,434	-1.1
Paper, Total	A	10,385,505	5,723,101	897,941	517,105	800,306	464,191	10,189,477	-2.4
Newsprint	A	8,118,161	4,162,493	693,453	372,408	638,029	349,769	7,968,889	-3.7
Printing, Writing & Rel. Pap.	A	1,914,083	1,296,073	174,380	122,211	140,121	96,906	1,886,886	6.2
Pack. & Ind. Conv. Paper		211,903	121,069	20,369	12,119	14,544	9,159	209,474	-3.2
Special Industrial Paper		57,441	68,444	3,524	5,050	3,268	4,328	40,753	-46.8
Tissue Paper		83,917	76,023	6,236	5,309	4,344	4,029	63,475	-8.8
Paperboard, Total		536,067	212,149	47,857	19,795	43,136	18,286	545,957	30.0
Convtd Paper&Paperbd Products		144,668	349,166	11,853	28,599	11,046	29,144	137,398	1.9
Wet Machine Board		884	757	71	59	84	64	932	22.4
Construction Paper & Board		124,576	32,418	5,052	1,330	4,450	1,131	57,008	-47.4

EXPORTS TO CANADA *								
Pulpwood, Roundwood (in cubic meters)	1,036,727	36,801	162,580	6,071	264,709	7,870	2,743,734	595.2
Pulpwood chips	193,841	9,066	19,069	837	16,381	818	212,819	70.7
Wood Pulp, Total	328,456	165,506	23,359	12,062	22,949	10,393	277,846	-30.5
Cotton Pulp & Other Pulp	4,373	4,284	534	487	375	355	5,450	84.6
Waste Paper	653,204	116,346	49,386	9,416	44,780	8,343	564,997	-1.3
Paper, Board & Products, Total	1,194,633	1,317,384	112,581	128,653	104,588	116,082	1,303,011	15.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	85,199	81,606	79,469	74,524	968,008	14.0
Paper, Paperboard & Products	1,192,443	1,315,698	112,465	128,571	104,411	115,963	1,301,258	15.4
Paper & Paperboard, Only	890,912	818,590	85,083	81,526	79,293	74,425	966,255	14.0
Paper, Total	521,586	595,962	49,692	58,727	50,322	56,676	600,086	15.7
Newsprint	20,813	11,389	1,585	939	2,103	1,312	22,130	9.1
Printing, Writing & Rel. Pap.	372,852	424,207	35,156	41,200	34,749	39,761	419,432	13.6
Pack. & Ind. Conv. Paper	52,367	36,780	5,176	3,987	4,780	3,379	59,732	13.7
Special Industrial Paper	59,301	106,279	5,079	9,756	4,854	8,671	59,596	-7.3
Tissue Paper	16,253	17,297	2,697	2,845	3,836	3,533	39,196	224.7
Paperboard, Total	369,326	222,636	35,391	22,799	28,971	17,749	366,170	11.3
Convtd Paper&Paperbd Products	301,531	497,106	27,382	47,044	25,118	41,538	315,003	20.0
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,689	116	82	176	99	1,753	54.9

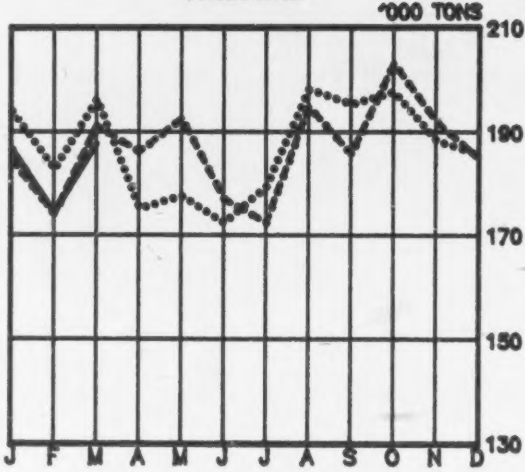
SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

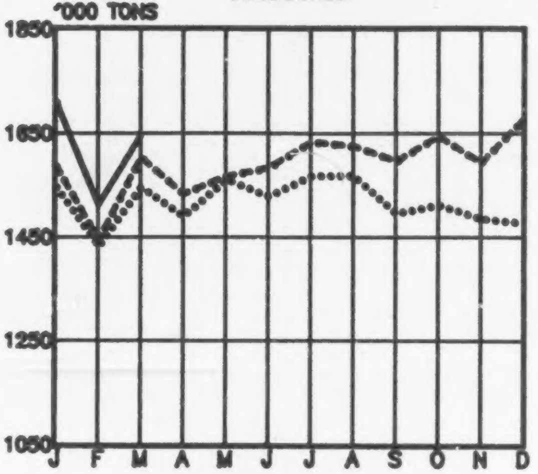
UNBLEACHED KRAFT PACKAGING
AND INDUSTRIAL CONVERTING PAPER
SHIPMENTS



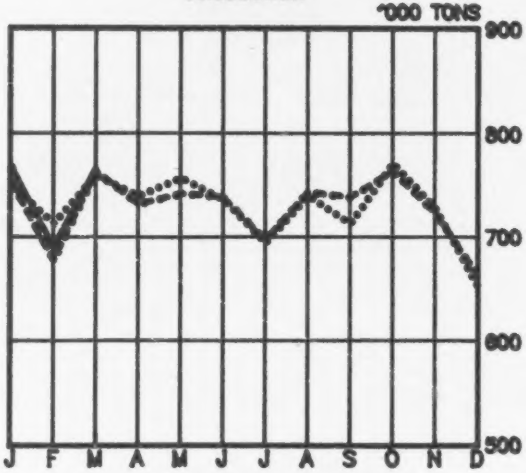
OTHER PAPER
PRODUCTION



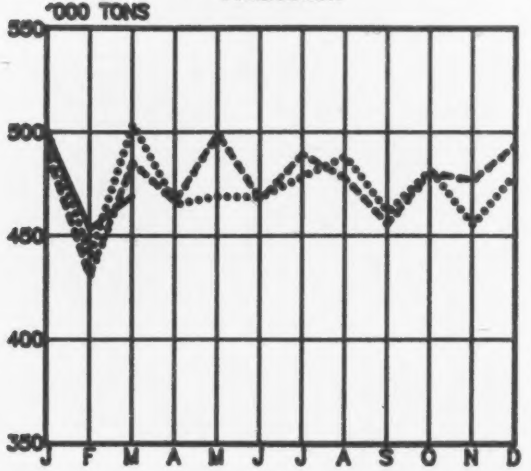
UNBLEACHED KRAFT LINERBOARD
PRODUCTION



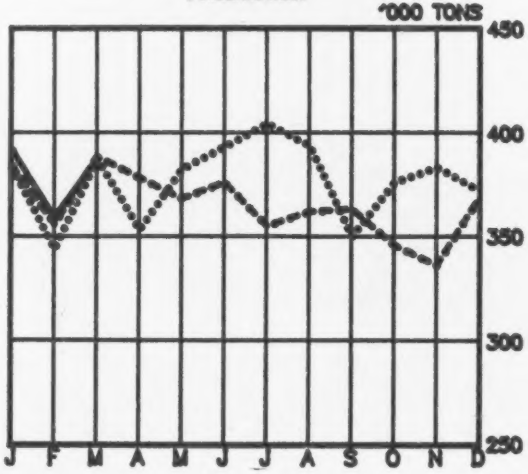
RECYCLED PAPERBOARD
PRODUCTION



SEMICHEMICAL PAPERBOARD
PRODUCTION



SOLID BLEACHED PAPERBOARD
PRODUCTION



1989 ········ 1990 - - - - - 1991 ———

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1990		JANUARY 1991		FEBRUARY 1991		Annual Rate YTD 1991 Tons (1)	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000		
Pulpwood Roundwood (cubic meters)		0	0	0	0	0	0	0	0.0
Pulpwood Chips		710,415	22,550	42,907	1,315	68,871	2,102	670,886	0.0
Total All Imports	A	18,177,409	11,292,258	1,544,019	936,815	1,453,893	875,383	17,967,470	−1.0
Wood Pulp Total	A	4,893,365	2,831,327	422,721	209,145	430,286	209,761	5,117,931	1.9
Waste Paper		122,539	26,349	8,360	1,632	10,088	2,154	113,588	−14.7
Other Fibrous Materials		14,037	9,286	955	963	334	184	7,732	−58.3
Paper Board & Products Total	A	13,147,479	8,425,293	1,111,984	724,856	1,012,723	663,295	12,748,242	−1.9
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,728,760	7,425,583	1,081,260	651,141	874,885	591,054	12,335,128	−2.1
Paper Ppbd & Prds ex Cnst&WMB	A	13,006,238	8,382,641	1,105,993	722,792	1,007,560	661,702	12,681,316	−1.5
Paper & Paperboard Only	A	12,587,519	7,382,931	1,075,268	649,078	959,432	589,461	12,288,202	−1.7
Paper Total	A	11,961,306	7,077,036	1,020,171	624,247	920,868	566,286	11,646,223	−2.6
Newsprint	A	8,299,557	4,247,131	703,995	376,919	650,714	355,418	8,128,256	−4.3
Printing & Writing	A	3,104,863	2,248,424	268,278	199,746	236,311	174,304	3,027,536	4.1
Uncoated Groundwood		1,337,581	843,550	118,310	76,323	110,207	72,057	1,371,097	14.1
Coated Print.& Impreg. Pap.	A	936,046	749,082	70,496	58,859	72,329	59,175	856,954	−5.2
Uncoated Free Sheet	A	752,448	584,479	70,549	54,104	47,098	35,043	705,880	−3.8
Thin (except Cigarette)		11,365	14,296	1,323	1,580	1,014	1,216	14,017	40.0
Bristols		67,424	77,017	7,601	8,880	5,864	6,814	79,589	36.4
Total Pkg & Other Paper		425,697	462,237	37,027	38,172	27,172	30,455	385,195	−13.2
Unbleached Kraft Paper		235,352	116,655	22,962	11,282	15,204	7,549	228,995	−0.4
Other Pkg. & Indust. Paper		190,345	345,582	14,065	26,890	11,968	22,906	156,200	−26.9
Tissue		131,189	119,244	10,671	9,411	6,669	6,109	105,238	−8.7
Paperboard, Total		626,213	305,895	55,098	24,831	46,586	23,175	621,979	19.5
Test or Containerboard		113,629	46,929	7,673	3,245	6,714	2,069	86,320	−19.4
Semi–Chemical Corrugating		111,935	31,152	9,618	2,405	4,642	1,149	85,559	−15.4
Other Paperboard		400,649	227,180	37,807	19,181	37,210	19,038	450,100	44.2
Convtd Paper&Paperbd Products		418,719	999,710	30,724	73,714	38,128	72,241	413,114	4.4
Paper Products, Total		313,106	807,967	22,471	58,877	30,911	57,361	320,293	5.3
Paperboard Products, Total		105,613	191,744	8,253	14,837	7,217	14,879	92,822	1.8
Wet machine Board		1,132	991	71	59	107	88	1,067	3.9
Construction Paper & Board E		140,110	41,661	5,920	2,004	5,057	1,505	65,859	−45.3
Notes									
Other: No Weight Avail. ($000)			136,809		10,251		8,783	114,206	16.3
Total Imports Incl. Other($000)			11,429,064		946,866		884,177	10,966,256	−4.1

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		JANUARY 1991		FEBRUARY 1991		Annual Rate YTD 1991 Tons (1)	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (cubic meters)	1,122,468	39,971	195,024	6,377	267,672	7,961	2,776,176	503.8
Pulpwood Chips	4,637,669	412,018	409,906	36,766	489,068	40,929	5,393,954	31.9
Total All Exports	19,352,011	9,075,342	1,753,999	784,278	1,670,249	769,850	20,545,485	17.5
Wood Pulp,Total	5,906,339	3,155,671	475,471	230,783	425,364	227,368	5,766,005	15.7
Cotton Pulp and Other Pulp	135,632	104,806	8,026	6,929	9,769	9,756	106,766	−5.6
Waste and Old Paper	6,514,652	779,667	620,254	71,222	530,972	59,995	6,907,360	17.1
Paper, Board & Products,Total	6,796,388	5,035,177	660,248	475,344	644,144	472,742	7,768,354	19.6
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	549,026	329,083	538,446	314,249	6,524,836	19.3
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,693	646,373	473,794	643,432	472,220	7,738,830	19.4
Paper & Paperboard, Only	5,738,750	3,443,249	545,151	327,533	537,734	313,728	6,497,312	19.0
Paper, Total	1,519,052	1,455,104	124,976	131,842	149,830	137,473	1,648,838	11.3
Newsprint	535,993	293,182	36,750	22,136	49,481	29,448	517,385	−3.6
Printing & Writing	664,824	717,700	62,415	70,376	70,396	69,586	796,866	21.5
Uncoated Groundwood	75,299	63,574	5,496	4,806	10,854	8,220	98,096	56.7
Clay Coated Paper	218,684	215,289	19,397	18,362	19,047	18,405	230,665	17.3
Uncoated Free Sheet	232,369	306,127	24,838	34,373	29,495	32,470	325,996	41.0
Other Printing & Writing	138,472	132,709	12,685	12,833	11,000	10,485	142,111	−14.4
Total Pkg. & Other Paper	283,584	403,949	21,715	34,834	25,051	33,378	280,597	9.5
Unbleached Kraft	112,828	60,490	7,386	4,563	9,881	5,290	103,800	5.5
Other Pkg. & Indust. Paper	170,756	343,469	14,330	30,271	15,170	28,088	176,996	11.9
Tissue	34,651	40,273	4,096	4,497	4,902	6,061	53,967	66.5
Paperboard, Total	4,219,698	1,988,144	420,175	195,690	387,904	176,254	4,848,474	21.9
Solid Wood Pulp	3,993,101	1,867,502	396,773	182,416	371,659	168,093	4,610,591	22.6
Total Linerboard	2,924,140	1,076,705	289,316	104,315	272,898	96,934	3,373,283	21.9
Bleached Kraft Linerboard	335,444	150,819	38,942	16,413	29,933	12,947	413,246	23.7
Unbleached Kraft Linerbd	2,588,697	925,886	250,374	87,902	242,965	83,987	2,960,037	21.6
Other Unbleached Kraft	253,945	144,169	30,669	18,124	27,478	15,268	348,881	30.0
Other Bleached Kraft	764,550	628,859	72,220	58,295	65,743	53,862	827,774	19.4
Semi–Chemical Corrugating	50,466	17,769	4,568	1,663	5,641	1,930	60,652	97.2
Recycled Paperboard	226,598	120,643	23,402	13,275	16,245	8,101	237,883	9.1
Convtd Paper&Paperbd Products	1,047,768	1,585,436	101,222	146,251	105,698	158,493	1,241,518	21.2
Paper Products, Total	440,793	1,012,642	40,777	90,939	45,578	104,329	518,128	31.7
Paperboard Products, Total	606,975	572,793	60,445	55,323	60,120	54,164	723,391	14.8
Wet Machine Board	487	232	28	31	16	8	246	−76.7
Construction Paper & Board E	9,384	6,252	3,850	1,519	696	517	27,276	326.9
Notes								
Other: No Weight Avail. ($000)		49,984		4,188		4,998	63,245	45.6
Total Exports Incl. Other($000)		9,125,306		788,467		774,536	9,378,018	10.1

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year–To–Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		DEC	JAN	FEB	MAR	Annual Rate Y-T-D	% Change from same Period Last Year
	1989	1990	1990	1991	1991	1991	1991	
Pulp, Paper and Products except Building Grades	132.4	132.9	132.9	132.4	132.5	131.9	132.3	–0.8
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	132.9	132.4	132.4	131.8	132.2	–0.6
Total Wood Pulp	157.4	151.5	144.7	133.5	132.9	126.7	131.0	–17.8
Total Paper	129.6	128.8	129.9	130.4	130.5	130.0	130.3	2.1
Writing Paper, exc. Newsprint	130.5	129.1	130.1	130.0	129.7	128.8	129.5	1.2
Newsprint	122.5	119.6	122.2	125.7	126.8	126.9	126.5	9.1
Total Paperboard	140.1	135.8	133.9	132.7	132.1	130.2	131.7	–5.3
Total Paper and Paperboard *	132.9	131.0	131.2	131.1	131.0	130.1	130.7	–0.4
Converted Products	131.7	135.1	135.9	136.0	136.1	136.2	136.1	1.2
Waste Paper	157.1	138.7	131.4	131.8	135.6	135.4	134.3	–10.6
All Commodities	112.2	116.3	118.6	118.9	117.2	116.1	117.4	2.5
Industrial Commodities	111.6	115.8	118.9	119.3	117.2	115.6	117.4	3.3

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

PAPER AND ALLIED PRODUCTS INDUSTRY
SALES, EARNINGS AND BALANCE SHEET DATA
1982 – 1990

(Millions of Dollars)

	Net Sales	Net Profit Before Taxes	Net Profit Before Taxes to Net Sales (%)	Taxes	Net Profit After Taxes	Net Profit After Taxes to Net Sales (%)	Stock-holders Equity	Return on Equity (%)	Long-term Debt	Total Assets
1982	60,293	2,120	3.5	660	1,460	2.4	26,705	5.5	13,149	52,915
1983	66,100	3,439	5.2	1,102	2,337	3.5	27,509	8.5	13,946	56,126
1983 R	65,008	3,424	5.3	1,096	2,327	3.6	27,219	8.5	13,565	54,821
1984	71,891	4,812	6.7	1,798	3,015	4.2	28,160	10.7	13,802	58,520
1985	71,761	4,424	6.2	1,533	2,891	4.0	29,780	9.7	15,262	62,613
1985 R	71,465	4,399	6.2	1,519	2,880	4.0	29,694	9.7	15,262	62,505
1986	74,896	5,318	7.1	2,025	3,293	4.4	31,254	10.5	18,920	69,132
1986 R	74,844	5,298	7.1	2,018	3,280	4.4	31,221	10.5	18,906	69,082
1987	86,603	8,077	9.3	3,088	4,989	5.8	35,162	14.2	20,152	76,791
1987 R	95,576	8,860	9.3	3,338	5,520	5.8	39,217	14.1	22,417	85,279
1988	107,014	12,204	11.4	4,127	8,077	7.5	42,933	18.8	27,067	95,295
1988 R	107,221	12,210	11.4	4,129	8,081	7.5	42,940	18.8	27,180	95,444
1989	112,238	10,771	9.6	3,771	7,000	6.2	45,888	15.3	33,193	107,572
1989 R										
First Quarter	110,376	12,172	11.0	4,184	7,992	7.2	43,811	18.2	29,016	98,562
Second Quarter	115,448	14,412	12.5	4,344	8,068	7.0	44,954	17.9	31,248	102,895
Third Quarter	113,824	11,876	10.4	4,388	7,488	6.6	46,246	16.2	32,909	105,834
Fourth Quarter	114,644	7,000	6.1	2,360	4,640	4.0	45,642	10.2	34,543	109,038
Total	113,573	11,365	10.0	3,819	7,047	6.2	45,642	15.4	34,543	109,038
1990										
First Quarter	114,136	8,412	7.4	2,856	5,556	4.9	48,519	11.5	37,028	114,912
Second Quarter	115,376	9,388	8.1	2,868	6,520	5.7	45,597	14.3	36,921	111,321
Third Quarter	115,448	7,636	6.6	2,652	4,984	4.3	45,185	10.8	38,460	113,708
Fourth Quarter	113,784	3,312	2.9	996	2,316	2.0	46,462	5.0	39,961	116,812
Total	114,686	7,187	6.3	2,343	4,844	4.2	46,462	10.4	39,961	116,812

NOTE: Quarterly data are at annual rates.
R=Revised to reflect changes in the number of companies classified to this industry.

SOURCE: Quarterly Financial Report for Manufacturing, Mining, and Trade Corporations – Bureau of the Census, U.S. Department of Commerce.

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Total containerboard production, bolstered by a 16% increase in production of unbleached kraft paperboard for export, gained 2.9% from its year-ago level in the first quarter of 1991.

Total boxboard production, restrained by a 6.4% decline in bleached kraft paperboard production for export, was off by 0.4%, but production of boxboard for domestic packaging use, defying market trends, rose 5.0%. Unbleached kraft folding boxboard increased 17%, reflecting both the relatively low rate of year-ago production and the start-up of a new machine producing these grades in the fall of 1990.

Bleached kraft folding boxboard output fell short of its year-ago total as mills took downtime for maintenance and repair. Conversely, clay coated recycled folding boxboard gained 8.1%.

IMPORTS AND EXPORTS

Lower domestic demand held total paper and paperboard imports below their year-ago levels in the first two months of 1991 (see table on page 9; the current import and export data presented in this table are fully consistent with year-ago totals for the first time since the Harmonized System was introduced two years ago).

As in domestic production, import weakness was centered on the paper grades, where a 2.6% decline was reported, largely the result of a 4.3% drop in imports of newsprint as publishers shifted to domestic sources. Newsprint accounted for 70% of total paper imports.

Imports of groundwood paper, however, rose 14%, to 1.37 million tons per year, as users continued to rely on Canadian and overseas producers for this grade of paper. Census data indicate that three-quarters of the total came from Canadian mills. However, data from the Canadian Pulp and Paper Association indicate that Canadian mills supplied the U.S. with another 500,000 tons per year of these papers, which apparently are included with newsprint. When the CPPA totals are taken into account, the January-February 1991 annual rate of groundwood paper imports rises to 1,866,000 tons, equivalent to 54% of the new supply.

Census reported paperboard imports up by 20%, reflecting a 44% increase in the recycled and bleached kraft grades. Imports of the containerboard grades were down sharply.

The Census data show that paper and paperboard exports were a major support to domestic production levels during the first two months of 1991. Paper exports, at 1.65 million tons per year, rose 11%, while exports of paperboard, consistent with API data on production for export, posted a 22% increase. The Census paperboard total of 4.8 million tons, however, is 20% higher than the comparable API rate for that period; Census data on bleached kraft and recycled paperboard is considerably above the comparable information reported to API by paperboard producers.

FIBROUS RAW MATERIALS

Preliminary data for the first three months of 1991 indicate that production of chemical paper grade market pulp increased 3.8% compared to the same period in 1990. Shipments showed even greater strength, rising 11.5 % in the first quarter, with export shipments contributing the entire 196,000 ton gain. Exports to Western Europe increased 20.6% (93,000 tons), Japan, 33.9% (68,000 tons), and to other Asian/African countries, 16.9% (45,000 tons).

The U.S. capacity utilization rate for chemical paper grade market pulp dipped to 89% in March, lowering the year-to-date average to 94%. This first quarter 1991 rate was above those of the other major pulp manufacturing countries -- Canada (90%), Sweden (93%), and Finland (80%).

SALES AND EARNINGS

Sales of 24 publicly-owned paper and allied products companies dropped 4% in the first quarter of 1991 from the same period a year-ago, while after-tax profits were nearly halved. This pattern is consistent with recent market trends. Sales margins, however, appear to be strengthening, rising to 3.4% in the first quarter of 1991 from their low of 2.2% in the fourth quarter of 1990.

The Department of Commerce's recently released Quarterly Financial Report details the paper industry's collective balance sheet and profit and loss statement for 1990. Sales of companies included in the Census report rose 1.0% in 1990; net income fell 50.1%. In comparison, sales for 24 publicly-owned paper and allied products companies, as reported in the press, grew 5.3% in 1990; after-tax profits dropped 37.1%.

Annual Census totals for 1982 to 1990, together with quarterly data for the last two years, are summarized in the table at the bottom of page 10. The quarterly data highlight the timing of the recession's impact on the paper and allied products industry's sales and profits. Below is a condensed review of the available first quarter statements.

Paper and Allied Products Companies
Sales and Earnings

	Sales			Net Profit After Taxes			Net Profits/Sales	
	1991	1990	91/90	1991	1990	91/90	1991	1990
	Thousand Dollars		% Change	Thousand Dollars		% Change	%	%
	24 Paper and Allied Products Companies							
First Quarter	16,753,384	17,502,050	-4.3	562,489	1,013,100	-44.5	3.36	5.79
Second Quarter		17,706,696			966,875			5.46
Third Quarter		17,633,467			737,920			4.18
Fourth Quarter		17,720,977			393,150			2.22
Year-to-date	16,753,384	17,502,050	-4.3	562,489	1,013,100	-44.5	3.36	4.41
Full Year		70,563,190			3,111,045			

INTERNATIONAL PRODUCTIVITY AND LABOR COST COMPARISONS

The Bureau of Labor Statistics (BLS) recently published data on output per manhour, employment, hourly compensation and unit labor costs (the ratio of hourly compensation to output per hour) in 14 countries, including the United States, for the period from 1960 through 1989.

Output per manhour in all manufacturing in the various countries is an important indicator of the increases in the country's standard of living and its potential as a market for foreign goods. The new data show that such major importers of paper and allied products from the United States as Japan, France, West Germany and the United Kingdom reported output per hour gains from 1988 to 1989 ranging from 4.2% (West Germany) to 6.1% (Japan). The increase in the United States was 3.3%. For the decade ending in 1989, Japan enjoyed a 5.5% per year increase in output per manhour, the United Kingdom, 4.7% per year, and Italy, 4.2%. In the other countries, output per manhour grew less than the United States' 3.6% per year.

Unit labor costs in all manufacturing are one indication of the competitive position of the various countries as exporters. The 0.6% increase in U.S. unit labor costs from 1988 to 1989 was close to the median when costs in other countries are measured in terms of their own currencies. Five countries -- Norway, Netherlands, France, Germany and Japan -- reported lower increases, ranging from -2.0% in Norway, to +0.4% in Japan. Sweden and Canada, major pulp and paper exporting countries, reported increases of 8.8% and 6.7%, respectively.

When the calculations were based on hourly compensation adjusted for each country's exchange rates relative to the U.S. dollar, eight countries showed smaller increases than the U.S.' 0.6% from 1988 to 1989. For the 1979-1989 period, five countries matched or fell below the 1.9% per year increase in unit labor costs reported for the United States.

Changes in unit labor costs for the Nordic and Western European countries in dollar terms were sharply lower than those in their national currencies because of increases in the value of the dollar relative to their respective currencies from 1988 to 1989. The U.S. dollar declined relative to those of Canada, Korea and Taiwan, and unit labor costs in these countries, measured in U.S. dollars, were sharply higher.

The table on page 14 presents data on changes in output per manhour, unit labor costs in local currencies and unit labor costs in U.S. dollars for each of the 14 countries for selected periods from 1960 through 1989.

CHANGES IN OUTPUT PER HOUR AND UNIT LABOR COSTS IN MANUFACTURING
14 COUNTRIES, 1960-1989

	UNITED STATES	CANADA	JAPAN	KOREA	TAIWAN	BELGIUM	DENMARK	FRANCE	GERMANY	ITALY	NETHER- LANDS	NORWAY	SWEDEN	UNITED KINGDOM
							PERCENT PER YEAR							
OUTPUT PER HOUR														
1960-1989	3.0	3.0	7.6	N.A.	N.A.	6.0	4.1	5.0	4.1	5.4	5.6	3.6	4.1	3.7
1960-1973	3.3	4.5	10.3	N.A.	N.A.	6.9	6.4	6.4	5.7	6.4	7.4	4.7	6.4	4.2
1973-1989	2.7	1.7	5.5	N.A.	N.A.	5.3	2.2	3.8	2.7	4.6	4.2	2.7	2.3	3.4
1973-1979	1.4	2.1	5.5	N.A.	N.A.	6.0	4.2	4.6	4.2	5.7	5.5	2.1	2.6	1.2
1979-1989	3.6	1.5	5.5	N.A.	N.A.	4.9	1.0	3.4	1.8	4.0	3.4	3.0	2.2	4.7
1979-1987	3.3	1.7	5.5	N.A.	N.A.	5.2	0.7	3.0	1.3	4.2	3.4	2.6	2.5	4.7
1987-1988	6.0	0.6	4.7	N.A.	N.A.	5.9	2.1	5.1	3.4	2.8	4.1	2.9	1.3	5.2
1988-1989	3.3	0.7	6.1	N.A.	N.A.	1.0	2.7	4.7	4.2	2.9	2.8	6.4	0.3	4.6
UNIT LABOR COSTS: NATIONAL CURRENCY BASIS														
1960-1989	3.1	4.6	3.0	N.A.	N.A.	3.6	6.3	5.8	4.0	8.5	3.6	6.8	6.3	7.3
1960-1973	1.8	1.6	4.3	N.A.	N.A.	3.8	5.5	3.4	4.3	5.5	5.2	5.4	3.9	4.8
1973-1989	4.2	7.1	1.9	12.4	7.5	3.4	7.0	7.9	3.8	11.0	2.4	8.0	8.2	9.4
1973-1979	8.2	9.8	6.9	20.2	11.3	7.5	9.4	11.2	4.9	15.9	5.8	11.0	11.3	18.0
1979-1989	1.9	5.6	-0.9	8.0	5.3	1.0	5.6	5.9	3.1	8.2	0.4	6.2	6.4	4.6
1979-1987	2.6	5.6	-0.9	6.6	5.7	1.3	6.7	7.6	3.8	9.1	1.1	7.6	6.3	5.2
1987-1988	-2.5	4.1	-2.4	11.2	3.2	-3.7	0.5	-0.8	0.4	2.4	-2.2	3.2	5.1	0.4
1988-1989	0.6	6.7	0.4	15.7	4.4	4.1	2.2	-0.1	0.3	7.6	-2.0	-2.0	8.8	3.5
UNIT LABOR COSTS: U.S. DOLLAR BASIS														
1960-1989	3.1	3.9	6.5	N.A.	N.A.	4.4	6.1	4.9	6.9	5.6	5.7	6.9	5.4	5.4
1960-1973	1.8	1.3	6.6	N.A.	N.A.	5.6	6.6	4.2	8.0	6.0	7.7	7.2	5.3	3.7
1973-1989	4.2	6.0	6.3	8.8	10.0	3.3	5.7	5.4	6.0	5.2	4.2	6.7	5.6	6.7
1973-1979	8.2	6.9	10.8	16.4	12.4	12.7	11.9	12.0	11.6	9.2	11.7	13.3	11.5	15.2
1979-1989	1.9	5.5	3.7	4.5	8.6	-1.9	2.2	1.7	2.8	2.9	-0.1	2.9	2.2	1.9
1979-1987	2.6	4.0	4.4	-0.2	7.4	-1.7	3.3	3.0	4.0	3.1	0.9	3.8	1.2	1.9
1987-1988	-2.5	12.2	10.1	25.0	14.4	-2.2	2.1	0.0	2.7	2.0	0.2	6.6	8.7	9.0
1988-1989	0.6	10.9	-6.8	26.1	13.3	-2.9	-5.9	-6.7	-6.3	2.2	-8.6	-7.5	3.4	-4.8

NOTES: RATES OF CHANGE BASED ON THE COMPOUND RATE METHOD.
HOURLY COMPENSATION DATA ADJUSTED TO INCLUDE EMPLOYMENT TAXES THAT ARE NOT COMPENSATION TO EMPLOYEES, BUT ARE LABOR COSTS TO EMPLOYERS.
SOURCE: U.S. DEPARTMENT OF LABOR, BUREAU OF LABOR STATISTICS.

N.A. - NOT AVAILABLE.

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MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 4
APRIL, 1991

PRODUCTION (000 TONS)

	(P) MAR 1991	(R) FEB 1991	MAR 1990	FIRST 3 MONTHS 1991	 1990	% CHANGE YR TO DATE 1991/1990
PAPER GRADES						
Newsprint	574	522	543	1,671	1,606	4.1
Printing & Writing	1,768	1,665	1,914	5,324	5,654	-5.8
Uncoated Groundwood (s)	147	133	149	424	445	-4.7
Coated Groundwood (s)	330	314	343	996	1,027	-3.0
Coated Free Sheet (s)	258	251	282	793	830	-4.5
Total Coated Paper (s)	588	565	625	1,789	1,857	-3.7
Uncoated Free Sheet Paper (s)	896	846	990	2,724	2,925	-6.8
Thin Paper (s)	18	17	27	55	74	-25.5
Cotton Fiber Paper (s)	13	11	16	37	43	-13.5
Bleached Bristols (s)	106	92	108	295	310	-4.9
Tissue Paper	485	459	500	1,429	1,425	0.3
Total Pkg & Other Paper	390	360	387	1,138	1,145	-0.6
Unbl. Kraft Paper (s)	202	186	196	590	596	-0.9
Bl. Kraft Paper (s)	36	36	39	106	122	-13.1
Specialty Pkg. Paper	50	46	48	148	134	10.5
Special Industrial Paper (s)	102	93	105	294	293	0.2
TOTAL PAPER	3,217	3,006	3,344	9,563	9,830	-2.7
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,701	1,624	1,715	5,148	4,961	3.8
Unbleached Kraft Linerboard	1,582	1,511	1,601	4,802	4,652	3.2
Other Unbl. Kraft Paperboard	119	113	114	346	309	12.1
Semichemical Paperboard	469	453	485	1,420	1,405	1.1
Bleached Paperboard	387	359	391	1,138	1,132	0.5
Recycled Paperboard	767	690	782	2,223	2,249	-1.1
TOTAL PAPERBOARD	3,324	3,126	3,373	9,929	9,747	1.9
TOTAL PAPER AND PAPERBOARD	6,540	6,131	6,717	19,493	19,577	-0.4

	FEB 1991	JAN 1991	FEB 1990	FIRST 2 MONTHS 1991	 1990	% CHANGE 1991/1990
Dissolving & Special Alpha	104	115	89	219	214	2.2
Bleached Sulfite) Unbleached Sulfite)	123	129	140	252	265	-4.9
Bleached & Semi-Bl. Sulfate	2,229	2,432	2,175	4,661	4,560	2.2
Unbleached Sulfate	1,746	1,969	1,721	3,715	3,614	2.8
Semichemical	329	371	326	700	700	0.0
Groundwood & Thermomechanical	503	563	500	1,066	1,040	2.6
TOTAL PULP DIVISION DATA	5,033	5,579	4,951	10,612	10,392	2.1

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA April 30, 1991	1989	1990	1991	1991 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD -- Tons (000)			JANUARY	FEBRUARY	MARCH		
Total Production (API): excluding :	76,785	78,834	6,821	6,131	6,540	77,971	-0.4
Total Seasonally Adjusted: construction :			6,613	6,503	6,262	77,513	-0.4
Imports (including Products): and wet : E	12,910	13,006	1,106	1,008	1,000	12,454	-5.6
Exports (including Products): machine : E	6,263	6,787	646	643	650	7,759	15.6
Apparent Consumption: grades :	83,432	85,054	7,073	6,867	6,612	82,206	-2.5
Paper Production % Tonnage Capacity	93.0	93.4	91.4	90.5	87.5	89.8	-
Paperboard Production % Tonnage Capacity	94.0	94.2	95.8	95.1	91.6	94.2	-
PAPER, PAPERBOARD AND PRODUCTS			DECEMBER	JANUARY	FEBRUARY		
Imports: Including Construction and :	13,100	13,147	994	1,112	1,013	12,748	-1.9
Exports: WMB Grades (excl. HPB) :	6,300	6,796	524	650	644	7,766	19.6
MARKET WOOD PULP PRODUCTION - Tons (000)	8,664	8,798	737	764	756	9,115	4.0
TOTAL WOOD PULP PRODUCTION - Tons (000)	61,998 f	63,068 f	5,428	5,579	5,033	63,672	2.1
WOOD PULP IMPORTS - TONS (000)	5,005	4,893	329	423	430	5,118	1.9
WOOD PULP EXPORTS - TONS (000)	6,231	5,905	477	475	485	5,765	15.7
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS: excluding :			DECEMBER	JANUARY	FEBRUARY		
Wood Pulp: consumption for :	60,252	61,032	5,129	5,437	4,845	61,691	2.3
Waste Paper: construction & :	19,490	21,039	1,717	1,816	1,669	20,912	4.7
TOTAL: WMB grades :	79,742	82,071	6,846	7,254	6,513	82,604	2.9
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	98,414	99,194 R	8,012	8,801	8,115	101,496	1.5
EMPLOYMENT (000)			JANUARY	FEBRUARY	MARCH		
Paper and Allied Products Total	697.1	696.4	690.6	689.4	687.6	689.2	-0.7
Pulp, Paper and Board Mills Total A	246.0	246.3	244.4	243.1	242.4	243.3	-0.7
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			JANUARY	FEBRUARY	MARCH		
Paper and Allied Products	11.96	12.30	12.51	12.51	12.57	12.53	3.5
Pulp, Paper Mills A	14.73	15.20	15.31	15.33	15.41	15.35	2.9
Paperboard Mills E	14.76	15.25	15.55	15.49	15.49	15.51	3.6
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q3	1990 Q4	1991 Q1		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.84	16.74	14.46	13.10	13.10 Y	-25.4
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			JANUARY	FEBRUARY	MARCH		
:IN PULP, PAPER :...Production Workers	126.3	128.4	129.9	129.4	125.5	128.3	-0.5
:AND BOARD MILLS:...All Employees	127.0	129.1	131.0	130.4	126.5	129.3	0.2
PAPER AND ALLIED PRODUCTS (Million $)			JANUARY	FEBRUARY	MARCH		
Industry Shipments (Dept. of Commerce)*	130,501	131,080	10,216	10,218	10,027	121,844	-6.1
Pulp, Paper and Paperboard*	57,700	56,356	4,484	4,413	4,377	53,096	-4.5
Inventories (End of Period) - Total Industry*	12,571	12,980	13,547	13,695	13,776	13,776	8.9
Pulp, Paper and Paperboard*	4,980	5,305	5,444	5,530	5,594	5,594	12.9
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q2	1990 Q3	1990 Q4		
Sales (Corporations Only)	113,573	114,686	28,844	28,862	28,446	N.D.	N.D.
Earnings (Corporations Only)	7,047	4,844	1,630	1,246	579	N.D.	N.D.
Depreciation (Corporations Only)	5,010	5,535	1,341	1,380	1,467	N.D.	N.D.
Net Worth (Corporations Only)	45,642	46,462	45,597	46,185	46,462	N.D.	N.D.
PRICE INDEXES (Bureau of Labor Stats)1982=100			JANUARY	FEBRUARY	MARCH		
Pulp, Paper & Products, ex. Building Grades	132.4	132.9	132.4	132.5	131.9	132.3	-0.8
Wood Pulp	157.4	151.5	133.5	132.9	126.7	131.0	-17.8
Waste Paper	157.1	138.7	131.8	135.6	135.4	134.3	-10.6
Paper	129.6	128.8	130.4	130.5	130.0	130.3	2.1
Paperboard	140.1	135.8	132.7	132.1	130.2	131.7	-5.3
PAPER DEMAND (INDEXED: 1987=100)			JANUARY	FEBRUARY	MARCH		
Total Paper Production *	103.7	106.9	105.2	102.9	99.6	102.6	-2.7
Paper New Supply *	102.4	104.7	103.9	99.1	98.1	100.4	-3.8
Demand Indicators - (Weighted Average) *	107.8	110.1	109.9	108.6	108.1	108.9	-1.0
Production of Nondurable Goods *...(21.2%)	106.4	107.8	106.9	105.7	105.5	106.0	-1.5
Disposable Income *...(23.9%)	107.2	108.1	106.8	106.8	107.0	106.9	1.5
Total Printing and Publishing *...(54.9%)	108.6	111.9	112.4	110.5	109.5	110.8	-0.5
PAPERBOARD DEMAND (INDEXED: 1987=100)			JANUARY	FEBRUARY	MARCH		
Total Paperboard Production *	103.0	105.4	108.2	106.9	102.4	105.8	1.9
Production for Domestic Use	103.2	104.7	106.8	105.1	98.5	103.5	0.9
Demand Indicators - (Weighted Average) *	107.2	107.9	105.7	104.8	104.9	105.1	-1.9
Production of Consumer Goods *...(62.06%)	106.6	107.3	105.5	104.5	104.9	105.0	-1.7
Production of Equipment *...(5.75%)	112.3	115.5	113.7	113.2	112.7	113.2	-0.1
Production of Materials *...(32.19%)	107.4	107.8	104.7	103.9	103.4	104.0	-2.8
MARKET DATA			DECEMBER	JANUARY	FEBRUARY		
Consumption by Publishers - Tons (000)	13,493	13,368	1,114	1,016	944	11,759	-6.2
Newspaper Pub. and Printing Empl. Total(000)	473	478	477	472	469	470	-1.2
Magazine Advertising Pages (PIB, Inc.)	161,996	174,282	15,202	9,486	12,840	133,836	-10.0
Wholesalers Sales and Inventories (Million $)			DECEMBER	JANUARY	FEBRUARY		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	50,015 RS	51,454	3,944	4,419	3,947	50,196	2.3
Inventories (End of Period)	4,132 RS	4,300	4,300	4,382	4,252	4,252	5.1
FIBRE BOX DATA (Fibre Box Association)			JANUARY	FEBRUARY	MARCH		
Fibre Box Shipments (Million square feet)	313,400	318,102	27,440	24,137	24,495	304,288	-3.8
Container'bd Inventory at Mill & Plant (000 Tons)	2,589	2,765	3,102	3,096	2,986	2,986	13.7
RETAIL TRADE (Billion $)							
Total Retail Sales *	1,742 RS	1,808	147.8	150.8	149.6	1,793	-0.8
Nondurable Goods Stores Sales *	1,089 RS	1,153	96.9	97.8	97.1	1,167	2.9
GENERAL ECONOMIC DATA			JANUARY	FEBRUARY	MARCH		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*	108.1	109.2	106.6	105.7	105.3	105.9	-2.2
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)	112.2	116.3	118.9	117.2	116.1	117.4	2.5
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)	124.0	130.7	134.6	134.8	135.0	134.8	5.3
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q3	1990 Q4	1991 Q1		
G.N.P. or Expenditure - Current $	5,201	5,465	5,515	5,527	5,562	5,562	3.5
G.N.P. or Expenditure - 1982 $	4,118	4,157	4,170	4,153	4,124	4,124	-0.6
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	671 RS	681	N.D. - No data available for 1991			653	

f - Wood Pulp Prod exc del., explo & scr. R - Revised RS - Revised series E - Last month estimated by API A - Est. by API Y - 1st quarter est. by Dept. c: Commerce * Seasonally Adjusted

A2500-2

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.5 MAY 1991

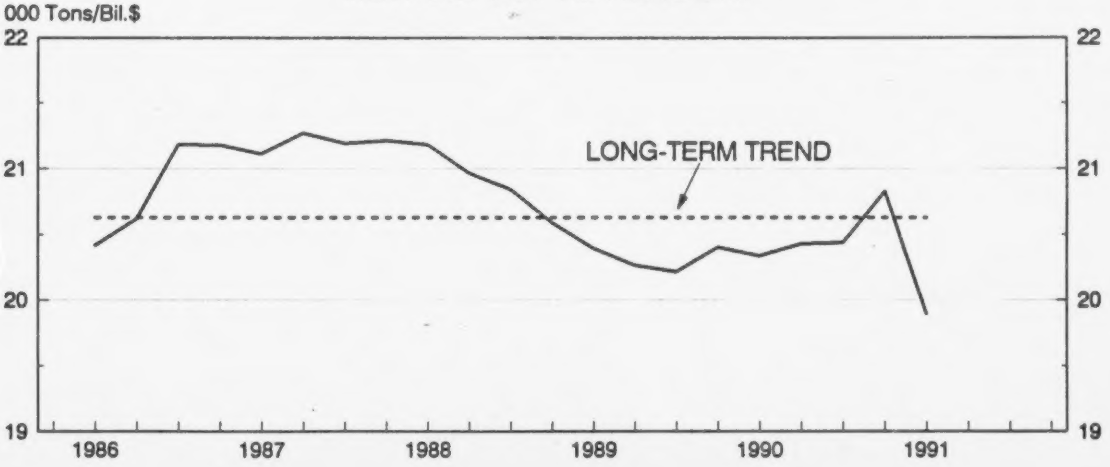
PAPER AND PAPERBOARD PRODUCTION: TREND FLATTENING

Production of paper and paperboard trailed its year-ago volume during March and April, after slightly exceeding it during the first two months of this year. (See chart on page 10) For the entire January-April period, production was off 0.5%, reflecting a recession-induced weakening in domestic demand. Growth in exports partly offset this decline, with the greatest positive impact in the paperboard sectors. The recent softness in total production follows a strong 1990 performance in which paper and paperboard output gained 2.6%, three times the real GNP rate.

Paper production was off 2.0% relative to year-ago in the first four months of 1991, with much of the weakness concentrated in the printing-writing grades. However, unshipped orders for the major printing-writing grades turned upward in April. Paperboard production posted a 1% gain, with much of the support deriving from a 12.6% increase in production for export and a significant increase in production of folding boxboard for domestic use.

Paper and paperboard new supply (production plus imports less exports) declined faster than real GNP during the first quarter of 1991, reversing the trend of the previous quarter. The chart below pictures the quarterly trend of the new supply/real GNP ratio from the first quarter of 1986 to the first quarter of 1991, together with the long-term trend of these ratios. It highlights the impact of the current recession on the U.S. paper industry.

RATIO OF PAPER AND PAPERBOARD
NEW SUPPLY TO REAL GNP



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Paper: Shipments of printing-writing papers trailed their year-ago levels by 5.4% in the first four months of 1991, with reductions in all major end-use categories. Exports of these papers, however, at an annual rate of 825,000 tons, registered strong gains, exceeding their year-ago volume by 20% in the January - March period. The first quarter 1991 figure, which accounted for 3.9% of domestic shipments, was 27.6% above printing-writing paper exports in the fourth quarter of 1990.

The strong advance in exports spanned most of the major world markets, with shipments to Canada, the largest foreign consumer of U.S. printing-writing papers, up 14.7% in the first quarter. At the grade level, the largest export increases relative to the first quarter of 1990 were in uncoated groundwood (up 36%) and uncoated free sheet (35%). Exports of coated groundwood and coated free sheet paper rose 12% and 14%, respectively.

Domestic demand for printing-writing papers was hampered by weak advertising markets. Magazine advertising pages, for example, trailed their year-ago pace by 11.7% in the first quarter of 1991; third class mail volume, a proxy for direct mail advertising, was also down fractionally. Stagnant employment levels in such office-paper intensive industries as finance, insurance and real estate may have also hurt printing-writing paper demand during recent months.

Consumers' inventories of printing-writing papers appear to have remained balanced, considering the weakness in the economy. Although printers' inventories have increased since late 1990, they remain well below the peak levels of 1987/88. Printing-writing paper wholesalers pruned inventories this year, but sales declined even more, causing inventory/sales ratios to tick upward.

The grade-specific data shown on page 3 indicate that shipments of uncoated free sheet papers were off 6.0% from January to April relative to year-ago levels. Unshipped orders of uncoated free sheet papers declined sharply from October 1990 to March 1991, but gained ground in April.

Shipments of coated papers were 4.0% below their year-ago total in the first four months of 1991, with coated groundwood off 3.4% and coated free sheet down 4.8%. Unshipped orders of coated papers increased in April following a weakening pattern that began in October 1990.

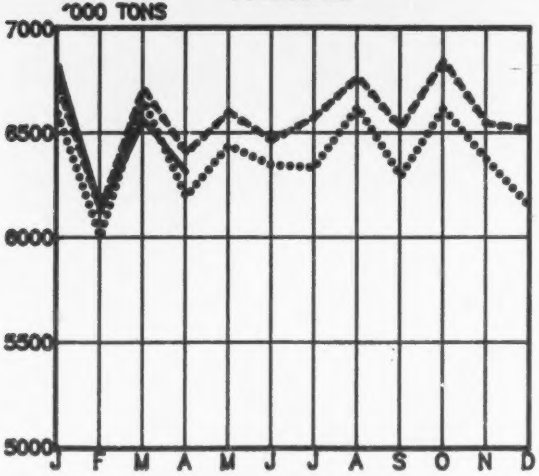
Shipments of uncoated groundwood papers posted a 5.3% decline in the first four months of 1991. Unshipped orders for these grades rose sharply between April and October 1990, and have since remained at the higher level. At the end of April 1991, unshipped orders for uncoated groundwood papers were 77% above their year-ago low.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		JAN	FEB	MAR (R)	APR (P)	Annual Rate Y-T-D	% Change From Same Period
	1989	1990	1990	1991	1991	1991	1991	Last Year
PAPER								
Newsprint – Production #	6,088	6,610	576	522	576	573	6,739	4.6
– Shipments #	6,079	6,621	581	513	563	553	6,630	2.8
Printing & Writing: Total Shipments #	21,626	22,336	1,888	1,665	1,767	1,715	21,108	–5.4
Groundwood Paper – Shipments	1,743	1,764	145	133	147	130	1,661	–5.3
– New Orders	1,741	1,831	171	126	151	126	1,720	3.7
– Unshipped Orders	193	124	234	231	235	220	220	77.2
Coated Groundwood – Shipments	4,059	4,233	352	314	330	314	3,930	–3.4
Coated Free Sheet – Shipments	3,157	3,303	282	250	257	239	3,084	–4.8
Total Coated Papers – Shipments	7,215	7,536	634	564	587	553	7,014	–4.0
– New Orders	7,171	7,438	619	517	597	581	6,941	–5.0
– Unshipped Orders	706	676	551	521	524	550	550	–18.7
Unctd Free Sheet – Shipments	11,081	11,475	983	849	897	904	10,900	–6.0
– New Orders	11,097	11,465	916	795	866	931	10,522	–9.9
– Unshipped Orders	748	720	598	566	511	549	549	–23.8
Thin Papers – Shipments	262	234	20	17	18	16	212	–22.0
Cotton Fiber Paper – Shipments	161	161	13	13	14	13	158	–7.9
Bleached Bristols – Shipments	1,164	1,166	94	89	105	99	1,161	–3.5
Tissue Paper – Production	5,636	5,802	485	459	505	477	5,781	1.8
Total Packaging & Other Paper	4,916	4,613	388	360	390	381	4,558	0.1
Unbl. Kraft Paper – Shipments	2,681	2,377	202	186	203	201	2,374	1.1
Bl. Kraft Paper – Shipments	468	484	35	36	36	34	421	–13.9
Specialty Pkg. Paper – Production	520	563	53	46	50	48	587	10.3
Special Industrial Paper – Shipments	1,248	1,190	99	93	102	98	1,176	–0.7
TOTAL PAPER PRODUCTION – UNADJUSTED	38,266	39,362	3,338	3,006	3,239	3,146	38,187	–2.0
TOTAL PAPER PRODUCTION – SEAS ADJ			3,234	3,167	3,096	3,201	38,097	–2.1
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,388	2,432	2,172	2,279	2,172	27,162	1.8
Cont'bd For Dom Use for Fibre Boxes	23,752	24,432	2,164	1,900	1,968	1,896	23,784	0.2
Total Linerboard	16,399	16,875	1,503	1,307	1,349	1,290	16,346	0.5
Unbleached Kraft	15,833	16,414	1,454	1,260	1,286	1,222	15,668	–1.1
Solid Bleached	178	139	12	10	12	12	142	–2.7
Recycled	388	323	36	36	50	56	536	99.2
Corrugating Medium	7,339	7,549	661	592	618	603	7,422	–0.6
Semichemical	5,554	5,567	489	434	454	447	5,472	0.0
Recycled	1,785	1,982	172	158	164	155	1,950	–2.3
Container Chip and Filler	14	7	0	1	2	2	17	69.7
Other Containerboard for Dom Use	307	282	23	21	26	25	280	4.2
Containerboard for Export	2,369	2,674	245	251	285	252	3,098	15.7
Boxboard	12,092	12,035	1,048	954	1,047	995	12,134	–0.7
Boxboard for Packaging for Dom Use	7,076	6,949	636	578	636	610	7,378	5.4
Folding Boxboard	5,370	5,198	477	440	482	464	5,588	7.4
Solid Bleached	1,980	1,818	166	148	162	163	1,916	2.6
Unbleached Kraft	987	970	92	93	93	93	1,112	19.7
Recycled	2,403	2,410	219	199	227	208	2,561	6.4
Set-up Boxboard for Dom Use	288	290	23	22	23	21	268	–16.5
Milk Carton & Food Service Dom Use	1,419	1,461	136	117	131	125	1,522	2.8
Other Boxboard for Domestic Use	4,152	4,145	330	291	318	297	3,704	–12.0
Boxboard for Export	863	941	83	86	94	89	1,052	4.2
Paperboard Production by Furnish	38,519	39,423	3,480	3,126	3,326	3,167	39,296	1.0
Unbleached Kraft	19,490	20,357	1,823	1,624	1,701	1,595	20,231	2.4
Semichemical	5,691	5,710	499	453	469	463	5,649	0.6
Solid Bleached Kraft	4,521	4,399	391	359	390	379	4,557	0.5
Recycled	8,817	8,956	767	690	767	730	8,860	–1.5
Paperboard Production for Export	3,232	3,615	328	336	379	340	4,150	12.6
Unbleached Kraft	2,363	2,691	254	251	296	256	3,171	16.7
Semichemical	138	142	10	18	15	15	177	27.4
Bleached Kraft	693	732	58	64	63	66	751	–4.4
Recycled	38	49	6	3	5	4	51	16.6
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,519	39,423	3,480	3,126	3,326	3,167	39,296	1.0
TOTAL PAPERBOARD PROD – SEAS ADJ			3,375	3,336	3,220	3,208	39,419	1.0
PAPER AND PAPERBOARD – UNADJ	76,785	78,785	6,818	6,132	6,565	6,313	77,482	–0.5
PAPER AND PAPERBOARD – SEAS ADJ			6,610	6,504	6,316	6,409	77,515	–0.5

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted # – 1990 Data Revised per Annual Audit

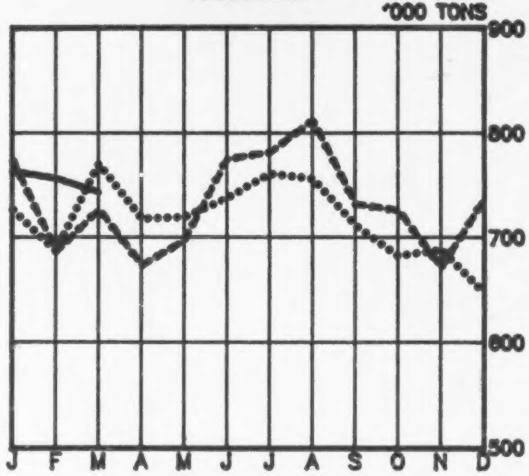
TOTAL PAPER AND PAPERBOARD

PRODUCTION



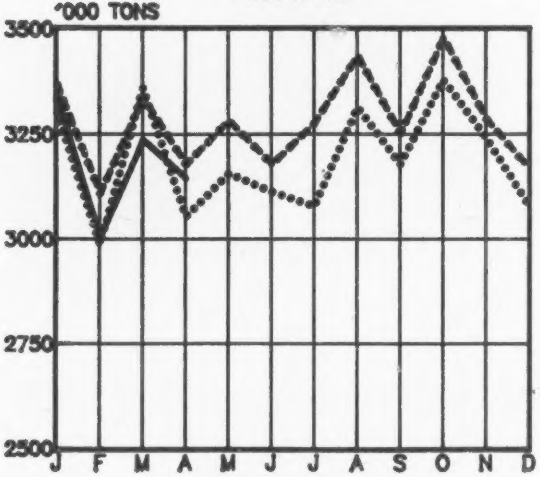
MARKET WOOD PULP

PRODUCTION



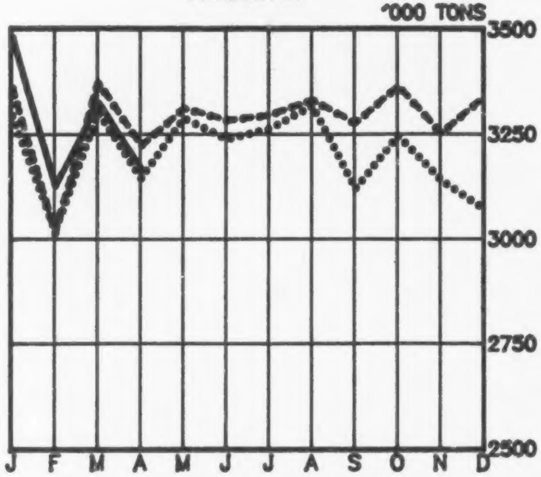
TOTAL PAPER

PRODUCTION



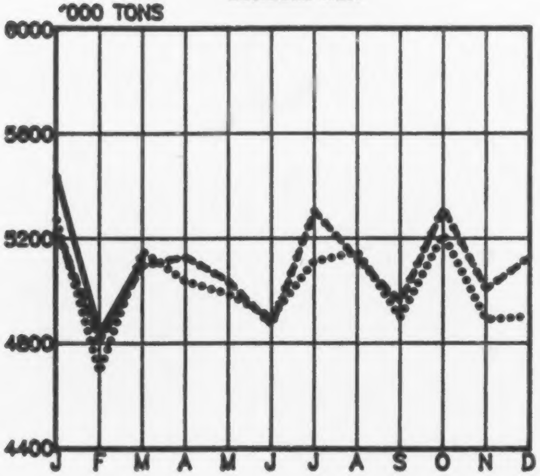
TOTAL PAPERBOARD

PRODUCTION



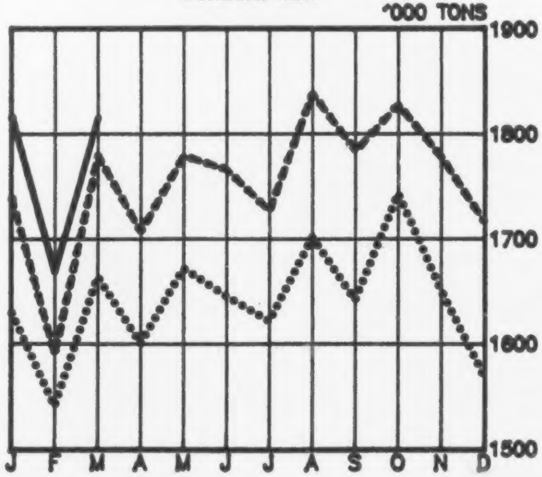
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 ········ 1990 – – – – 1991 ———

WOOD PULP STATISTICS (Thousands of Tons)			YEAR 1989	YEAR 1990	DEC 1990	JAN 1991	FEB (R) 1991	MAR (P) 1991	Annual Rate Y-T-D 1991	% Change From Same Period Last Year
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,998	63,068	5,428	5,579	5,033	5,316	63,710	2.0
	Imports	A	5,005	4,893	329	423	430	400	5,013	-1.1
	Exports	#	5,766	5,905	477	475	485	600	6,245	10.9
	New Supply		61,237	62,056	5,280	5,526	4,978	5,115	62,478	0.9
Dissolving Pulp	Production		1,425	1,293	123	115	104	124	1,373	1.9
	Imports		284	222	23	10	18	7	137	-43.2
	Exports	#	798	782	68	52	64	70	744	2.6
	New Supply		912	733	77	73	58	61	766	-11.2
Paper Grades Chemical Pulp	Production		50,181	51,192	4,392	4,530	4,098	4,307	51,736	1.9
	Imports	A	4,370	4,326	293	387	386	363	4,544	2.1
	Exports	#	4,913	5,080	404	422	418	524	5,460	12.4
	New Supply		49,639	50,438	4,280	4,494	4,065	4,145	50,819	0.9
Groundwood and Thermo-Mech	Production		6,029	6,363	554	563	503	547	6,452	4.8
	Imports	A	351	345	14	26	26	31	333	-11.0
	Exports	#	55	44	4	1	3	6	41	-13.6
	New Supply		6,324	6,665	563	589	526	571	6,743	4.0
Semi-Chemical	Production		4,363	4,219	359	371	329	338	4,150	-1.1
	Imports									
	Exports									
	New Supply		4,363	4,219	359	371	329	338	4,150	-1.1
MARKET WOOD PULP										
Total Market Wood Pulp	Production		8,664	8,798	737	764	757	744	9,057	3.5
	Imports		3,539	3,045	210	249	263	218	2,921	-7.3
	Exports		5,309	5,561	530	435	476	562	5,894	16.6
	New Supply		6,893	6,282	417	577	544	400	6,084	-11.1
Dissolving Pulp	Production		1,422	1,292	123	115	104	124	1,371	1.8
	Imports		210	232	13	19	17	18	215	-9.8
	Exports		821	782	85	58	62	75	780	3.3
	New Supply		810	742	51	77	58	67	807	-2.9
Paper Grades Chemical Pulp	Production		7,242	7,506	614	649	653	620	7,686	3.8
	Imports		3,072	2,813	197	229	247	200	2,706	-7.1
	Exports		4,489	4,779	446	378	414	487	5,115	18.9
	New Supply		5,825	5,540	366	500	486	333	5,277	-12.3
Groundwood Pulp and All Other	Production		0	0	0	0	0	0	0	0.0
	Imports RS		258	0	0	0	0	0	0	0.0
	Exports		0	0	0	0	0	0	0	0.0
	New Supply		258	0	0	0	0	0	0	0.0

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

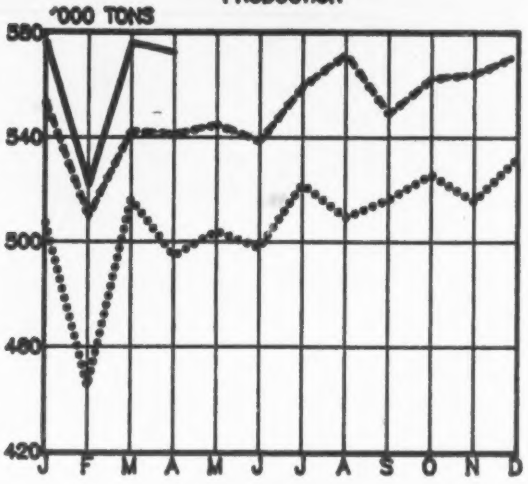
NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. RS – Revised Series. # – 1989 Exports revised by API.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1989	YEAR 1990	DEC 1990	JAN 1991	FEB (R) 1991	MAR (P) 1991	Annual Rate 1991	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,071	6,846	7,254	6,513	6,945	82,850	2.3
Total Wood Pulp	60,252	61,032	5,129	5,437	4,845	5,129	61,642	1.7
Waste Paper	19,490	21,039	1,717	1,816	1,669	1,817	21,208	3.8
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	226	201	216	219	219	8.3
Producers' Market Inventories	342	476	476	521	554	482	482	-1.2
Consumers' Purchased Inventories #	519	392	392	419	409	406	406	-14.6
Waste Paper at Paper & Bd. Mills	1,082	909	909	927	917	905	905	-11.6
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	23	26	27	23	23	-11.5

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # Includes all grades of wood pulp
P – Preliminary; R – Revised; 0 – Indicates zero to five-hundred short tons

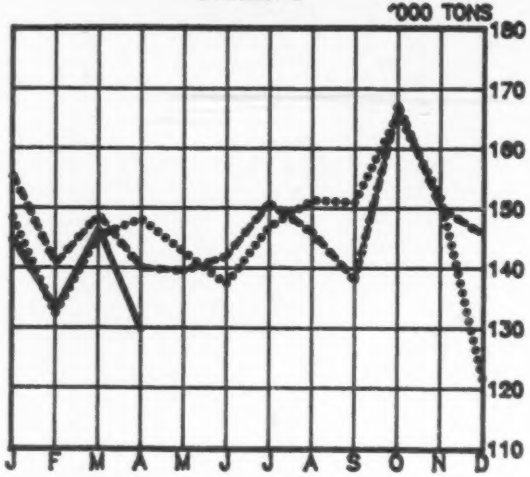
NEWSPRINT

PRODUCTION



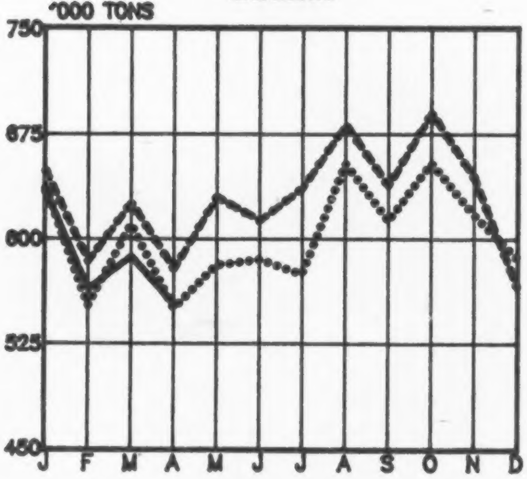
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



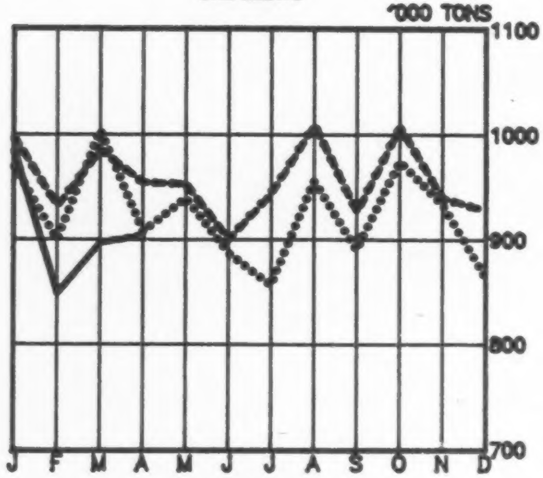
COATED PAPER

SHIPMENTS



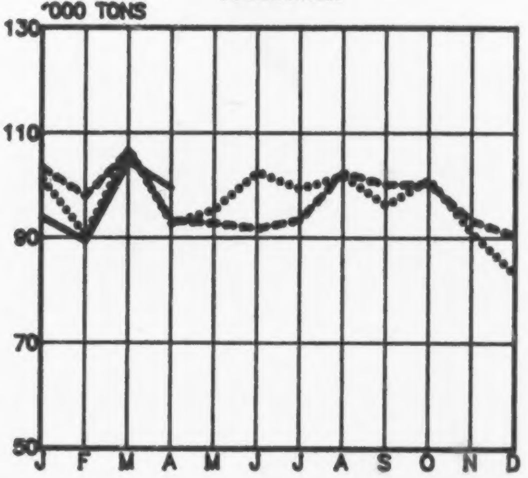
UNCOATED FREE SHEET PAPERS

SHIPMENTS



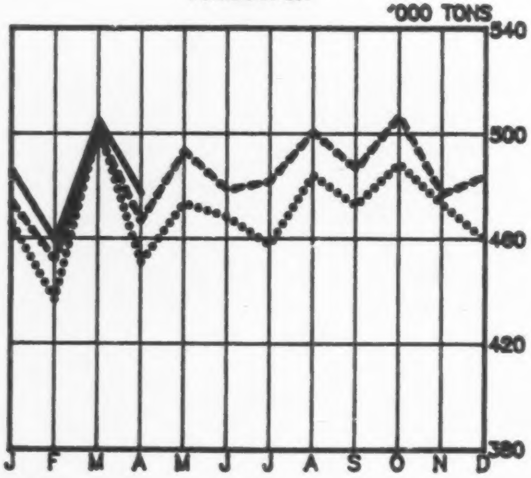
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1989 ········ 1990 ━ ━ ━ ━ 1991 ━━━━

FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1989	YEAR 1990	DECEMBER 1990	JANUARY 1991	FEBRUARY 1991	MARCH 1991	ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,279	99,304	7,920	8,779	8,171	8,161	100,444	-0.4
– Total Consumption	98,414	99,194	8,012	8,801	8,115	8,161	100,308	0.3
– Residues *	34,539	35,727	2,764	2,969	2,777	2,856	34,408	-3.1
– Inventories	5,462	5,961	5,961	5,732	5,554	5,670	5,670	4.4
So. Atlantic – Total Receipts	31,982	32,536	2,598	2,792	2,631	2,518	31,764	-6.0
– Total Consumption	32,239	32,412	2,667	2,868	2,659	2,641	32,672	0.0
– Residues *	9,961	11,181	911	901	854	858	10,812	-4.0
– Inventories	936	1,334	1,334	1,257	1,291	1,194	1,194	16.4
Northeast – Total Receipts	7,242	7,264	597	694	655	633	7,928	2.9
– Total Consumption	7,072	7,080	558	589	590	603	7,128	-3.0
– Residues *	1,575	1,505	124	146	140	145	1,724	14.0
– Inventories	522	449	449	504	531	523	523	-4.7
South Central – Total Receipts	35,840	37,246	3,059	3,467	2,993	3,236	38,792	8.2
– Total Consumption	35,791	36,784	3,027	3,431	3,079	3,148	38,632	5.4
– Residues *	10,539	11,516	920	1,028	923	993	11,776	5.9
– Inventories	1,336	1,879	1,879	1,715	1,472	1,629	1,629	33.4
North Central – Total Receipts	7,020	7,074	596	748	709	575	8,128	7.6
– Total Consumption	6,963	7,129	605	647	597	605	7,396	2.9
– Residues *	1,422	1,308	92	93	100	101	1,176	-9.3
– Inventories	936	1,014	1,014	1,113	1,144	1,203	1,203	16.8
West – Total Receipts	17,195	15,184	1,068	1,078	1,183	1,197	13,832	-11.5
– Total Consumption	16,349	15,789	1,155	1,266	1,190	1,164	14,480	-10.4
– Residues *	11,042	10,217	717	711	760	759	8,920	-13.7
– Inventories	1,730	1,285	1,285	1,143	1,116	1,121	1,121	-29.8

SOURCE: American Pulpwood Association

* – Consumption of Residues in cords equivalent

		IMPORTS FROM CANADA *						ANNUAL RATE Y-T-D	% CHANGE
UNITED STATES TRADE WITH CANADA		YEAR 1990		FEBRUARY 1991		MARCH 1991		1991	FROM SAME PD LAST YEAR
		Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)		0	0	0	0	0	0	0	0.0
Pulpwood chips		709,197	22,413	68,638	2,090	49,166	1,353	642,667	-5.3
Wood Pulp, Total	A	4,322,418	2,514,301	341,370	169,528	368,583	178,262	4,407,926	-4.4
Waste Fibrous Materials, Total		130,452	31,442	9,840	2,134	12,893	3,052	123,366	-16.9
Paper, Board & Products, Total	A	11,191,700	6,317,590	859,022	512,797	857,202	516,735	10,715,991	-5.5
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	A	11,047,032	5,968,425	847,976	483,653	845,176	485,365	10,576,265	-5.6
Paper, Paperboard & Products	A	11,066,239	6,284,416	854,488	511,601	852,223	515,400	10,657,447	-5.1
Paper & Paperboard, Only	A	10,921,571	5,935,250	843,442	482,457	840,198	484,030	10,517,741	-5.2
Paper, Total	A	10,385,505	5,723,101	800,306	464,191	798,142	466,510	9,985,551	-6.1
Newsprint	A	8,115,161	4,162,493	638,029	349,769	623,778	345,754	7,821,040	-7.1
Printing, Writing & Rel. Pap.	A	1,914,083	1,295,073	140,121	96,906	148,440	101,258	1,851,685	-0.4
Pack. & Ind. Conv. Paper		211,903	121,069	14,544	9,159	17,461	10,463	209,496	-6.0
Special Industrial Paper		57,441	68,444	3,268	4,326	3,730	4,747	42,090	-40.2
Tissue Paper		83,917	76,023	4,344	4,029	4,731	4,289	81,242	-5.1
Paperboard, Total		536,067	212,149	43,136	18,266	42,055	17,520	532,190	17.1
Convtd Paper&Paperbd Products		144,668	349,166	11,046	29,144	12,027	31,370	139,706	-0.3
Wet Machine Board		884	757	84	64	38	36	775	-28.2
Construction Paper & Board		124,576	32,418	4,450	1,131	4,941	1,299	57,769	-47.1

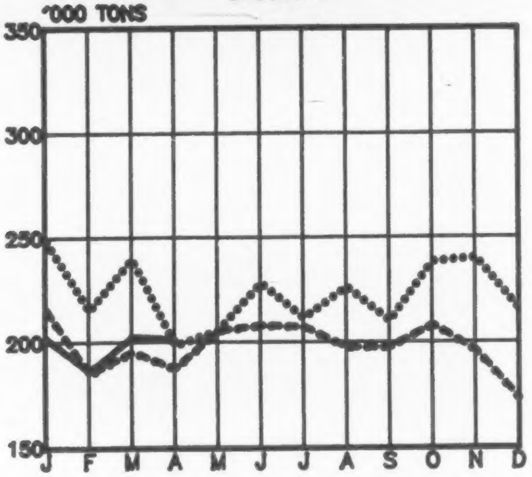
	EXPORTS TO CANADA *							
Pulpwood, Roundwood (in cubic meters)	1,036,727	36,801	264,709	7,870	201,026	5,823	2,633,260	549.1
Pulpwood chips	193,641	9,066	16,381	818	17,853	678	213,291	18.0
Wood Pulp, Total	328,456	165,508	22,949	10,393	27,905	11,814	296,860	-24.3
Cotton Pulp & Other Pulp	4,373	4,264	375	355	418	363	5,305	36.6
Waste Paper	653,204	116,346	44,780	8,343	47,824	8,911	567,962	-5.0
Paper, Board & Products, Total	1,194,633	1,317,384	104,588	116,062	112,537	126,308	1,318,823	13.4
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	79,469	74,524	84,821	81,242	997,964	12.6
Paper, Paperboard & Products	1,192,443	1,315,696	104,411	115,963	112,398	126,220	1,317,099	13.4
Paper & Paperboard, Only	890,912	818,590	79,293	74,425	84,682	81,154	996,230	12.6
Paper, Total	521,586	595,952	50,322	56,676	56,017	63,582	624,123	17.5
Newsprint	20,813	11,389	2,103	1,312	1,884	1,149	22,288	9.1
Printing, Writing & Rel. Pap.	372,852	424,207	34,749	39,781	40,630	45,890	442,140	14.7
Pack. & Ind. Conv. Paper	52,367	36,780	4,780	3,379	5,351	3,901	61,224	19.2
Special Industrial Paper	59,301	106,279	4,854	8,671	5,390	9,833	61,290	0.0
Tissue Paper	16,253	17,297	3,836	3,533	2,762	2,810	37,180	193.6
Paperboard, Total	369,326	222,638	28,971	17,749	28,665	17,572	372,107	5.3
Convtd Paper&Paperbd Products	301,531	497,106	25,118	41,538	27,717	45,066	320,869	15.8
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,689	176	99	139	88	1,724	23.7

SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

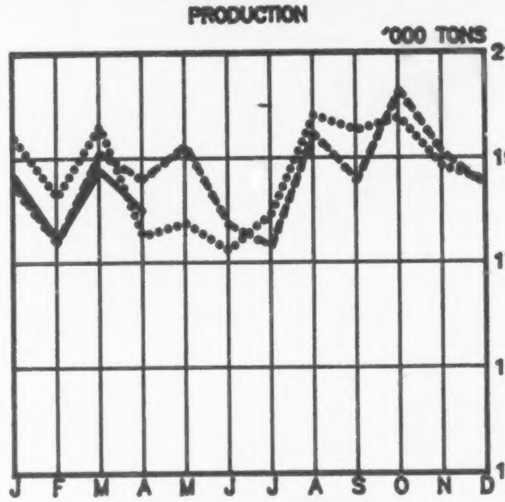
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



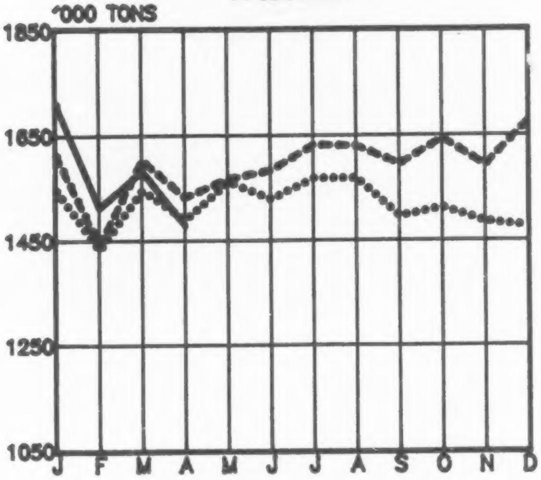
OTHER PAPER

PRODUCTION



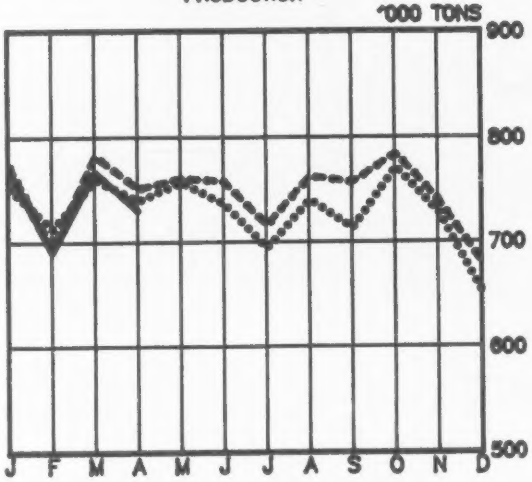
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



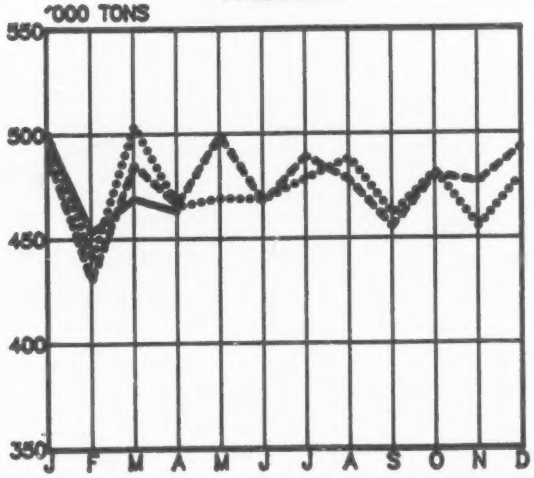
RECYCLED PAPERBOARD

PRODUCTION



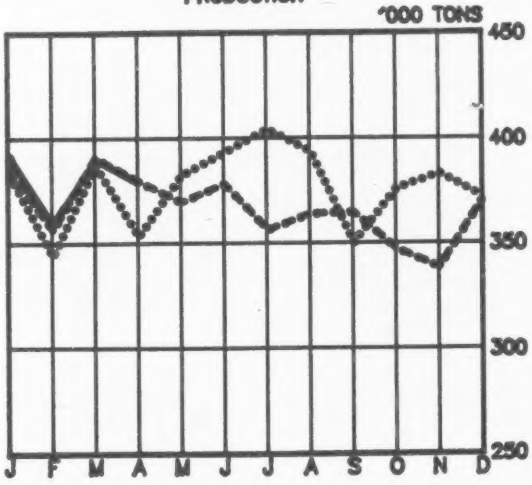
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1989 ········ 1990 - - - - 1991 ——

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1990		FEBRUARY 1991		MARCH 1991		Annual Rate YTD 1991	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)		0	0	0	0	0	0	0	0.0
Pulpwood Chips		710,415	22,550	68,871	2,102	49,166	1,353	643,774	-5.3
Total All Imports	A	18,177,409	11,292,256	1,453,893	875,393	1,407,742	863,781	17,622,614	-4.9
Wood Pulp Total	A	4,893,355	2,831,327	430,298	209,761	400,236	191,622	5,012,904	-1.1
Waste Paper		122,539	26,349	10,568	2,154	13,219	3,076	128,588	-5.2
Other Fibrous Materials		14,037	9,286	334	184	590	392	7,513	-52.2
Paper Board & Products Total	A	13,147,479	8,425,293	1,012,723	663,295	993,699	668,689	12,473,611	-6.3
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,728,760	7,425,583	974,595	591,054	962,094	592,926	12,071,794	-6.5
Paper Ppbd & Prds ex Cnst&WMB	A	13,006,238	8,382,641	1,007,560	661,702	987,873	665,759	12,406,702	-6.9
Paper & Paperboard Only	A	12,587,519	7,382,931	969,432	589,461	956,271	590,907	12,003,888	-6.1
Paper Total	A	11,961,306	7,077,036	920,866	566,296	906,985	566,966	11,392,088	-6.9
Newsprint	A	8,299,557	4,247,131	650,714	355,418	632,746	350,015	7,949,819	-7.5
Printing & Writing	A	3,104,863	2,248,424	236,311	174,304	234,114	173,013	2,954,812	-4.2
Uncoated Groundwood		1,337,581	843,550	110,207	72,057	109,997	71,645	1,354,050	2.1
Coated Print.& Impreg. Pap.	A	936,046	749,082	72,329	59,175	66,079	56,832	835,618	-12.2
Uncoated Free Sheet	A	752,448	564,479	47,098	35,043	50,731	37,056	673,512	-8.2
Thin (except Cigarette)		11,365	14,296	1,014	1,216	1,268	1,365	14,416	28.5
Bristols		67,424	77,017	5,664	6,814	6,039	7,116	77,216	27.2
Total Pkg & Other Paper		425,697	462,237	27,172	30,456	33,504	37,956	390,814	-11.7
Unbleached Kraft Paper		235,352	116,655	15,204	7,549	19,547	9,770	230,852	-1.6
Other Pkg. & Indust. Paper		190,345	345,582	11,968	22,906	13,957	28,186	159,962	-23.0
Tissue		131,189	119,244	6,669	6,109	6,621	5,961	96,643	-11.8
Paperboard, Total		626,213	305,895	48,566	23,175	49,286	24,031	611,796	11.0
Test or Containerboard		113,629	48,929	6,714	2,989	7,721	3,084	88,431	-30.5
Semi-Chemical Corrugating		111,935	31,152	4,642	1,149	3,646	870	71,622	-33.2
Other Paperboard		400,649	227,180	37,210	19,038	37,919	20,076	451,744	42.6
Convtd Paper&Paperbd Products		418,719	999,710	38,128	72,241	31,602	75,763	401,816	-1.8
Paper Products, Total		313,106	807,967	30,911	57,361	23,600	59,976	307,928	-2.6
Paperboard Products, Total		105,613	191,744	7,217	14,879	8,002	15,787	93,889	1.1
Wet machine Board		1,132	991	107	88	61	53	953	-29.5
Construction Paper & Board E		140,110	41,661	5,057	1,806	5,762	1,876	66,956	-44.9
Notes									
Other: No Weight Avail. ($000)			136,809		8,783		7,454	105,953	-2.7
Total Imports Incl. Other($000)			11,429,064		884,177		871,236	10,809,110	-7.3

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		FEBRUARY 1991		MARCH 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	1,122,466	30,671	267,672	7,951	204,385	5,906	2,898,324	457.5
Pulpwood Chips	4,637,699	412,018	489,098	40,929	385,253	36,719	5,136,987	25.6
Total All Exports	19,352,011	9,075,342	1,670,249	769,850	1,836,488	864,415	21,042,942	12.6
Wood Pulp,Total	5,905,339	3,155,671	485,364	227,358	600,361	273,261	6,244,800	10.9
Cotton Pulp and Other Pulp	135,632	104,808	9,769	9,750	8,701	7,516	105,960	-3.7
Waste and Old Paper	6,514,652	779,687	530,972	59,995	504,690	61,942	6,623,068	6.5
Paper, Board & Products,Total	6,796,388	5,035,177	644,144	472,742	722,716	521,697	8,068,434	20.1
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	538,446	314,249	619,895	362,860	6,829,466	20.4
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,683	643,432	472,220	721,861	521,111	8,046,663	19.9
Paper & Paperboard, Only	5,738,750	3,443,249	537,734	313,726	619,039	362,274	6,807,698	20.2
Paper, Total	1,519,052	1,455,104	149,830	137,473	166,467	156,702	1,765,092	17.5
Newsprint	535,993	293,182	49,481	29,448	57,936	33,530	576,962	11.6
Printing & Writing	664,824	717,700	70,396	69,586	73,290	76,757	824,404	20.3
Uncoated Groundwood	75,299	63,574	10,854	8,226	8,558	7,267	99,631	35.9
Clay Coated Paper	218,684	215,289	19,047	18,405	22,316	21,130	243,042	13.0
Uncoated Free Sheet	232,369	306,127	29,495	32,470	26,478	34,196	323,241	35.0
Other Printing & Writing	138,472	132,709	11,000	10,485	15,937	14,162	158,489	0.7
Total Pkg. & Other Paper	283,584	403,949	25,051	33,378	30,404	40,912	308,681	16.0
Unbleached Kraft	112,828	60,480	9,881	5,290	13,222	8,354	121,955	14.8
Other Pkg. & Indust. Paper	170,756	343,469	15,170	28,088	17,182	32,558	186,726	16.7
Tissue	34,651	40,273	4,902	5,061	4,838	5,504	55,345	63.0
Paperboard, Total	4,219,698	1,988,144	387,904	176,254	452,573	205,572	5,042,606	21.1
Solid Wood Pulp	3,993,101	1,867,502	371,659	168,093	435,184	196,051	4,814,463	22.2
Total Linerboard	2,924,140	1,076,705	272,898	96,934	326,541	118,913	3,555,020	22.6
Bleached Kraft Linerboard	335,444	150,819	29,933	12,947	38,971	17,936	431,381	25.4
Unbleached Kraft Linerbd	2,588,697	925,886	242,965	83,987	287,570	100,977	3,123,639	22.2
Other Unbleached Kraft	253,945	144,169	27,478	15,368	38,142	22,217	365,156	53.5
Other Bleached Kraft	764,550	628,850	65,743	53,862	66,031	53,422	815,[illegible]75	8.3
Semi-Chemical Corrugating	50,466	17,769	5,541	1,930	4,409	1,499	56,312	66.0
Recycled Paperboard	226,598	120,643	16,245	8,161	17,389	9,522	228,143	2.1
Convtd Paper&Paperbd Products	1,047,768	1,585,435	105,698	158,493	102,822	158,837	1,238,968	18.4
Paper Products, Total	440,793	1,012,642	45,578	104,329	48,268	107,340	538,491	31.0
Paperboard Products, Total	606,975	572,793	60,120	54,164	54,554	51,497	700,474	10.3
Wet Machine Board	487	232	16	6	33	23	286	-70.1
Construction Paper & Board E	9,384	6,262	696	617	823	963	21,475	188.6
Notes								
Other: No Weight Avail. ($000)		49,984		4,686		4,174	52,191	27.6
Total Exports Incl. Other($000)		9,125,306		774,536		868,589	9,726,366	7.1

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

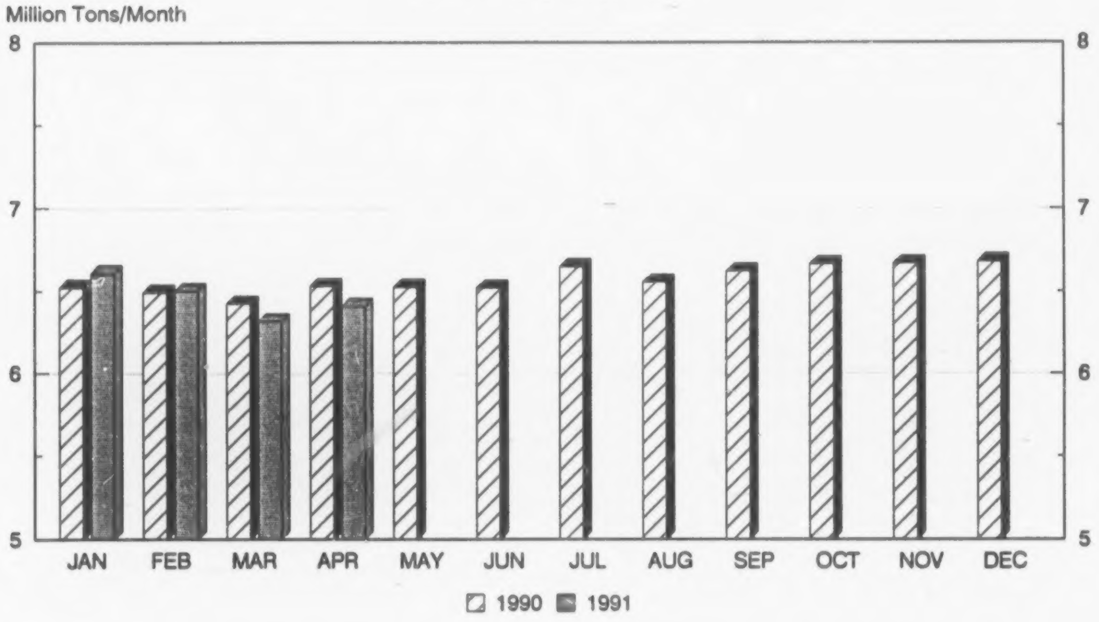
(1) Annual Rate Year–To–Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		JAN	FEB	MAR	APR	Annual Rate Y-T-D	% Change from same Period
	1989	1990	1991	1991	1991	1991	1991	Last Year
Pulp, Paper and Products except Building Grades	132.4	132.9	132.4	132.5	131.9	130.7	131.9	-1.1
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	132.4	132.4	131.8	130.7	131.8	-0.9
Total Wood Pulp	157.4	151.2	133.5	132.9	126.7	125.7	129.7	-18.1
Total Paper	129.6	128.8	130.4	130.5	130.0	127.8	129.7	1.5
Writing Paper, exc. Newsprint	130.5	129.1	130.0	129.7	128.8	126.2	128.7	0.4
Newsprint	122.5	119.6	125.7	126.8	126.9	121.3	125.2	8.1
Total Paperboard	140.1	135.7	132.7	132.1	130.2	128.3	130.8	-5.6
Total Paper and Paperboard *	132.9	131.0	131.1	131.0	130.1	128.0	130.0	-0.8
Converted Products	131.7	135.1	136.0	136.1	136.2	135.6	136.0	0.9
Waste Paper	157.1	138.9	131.8	135.6	135.4	133.4	134.1	-10.1
All Commodities	112.2	116.3	118.9	117.2	116.1	116.0	117.1	2.3
Industrial Commodities	111.6	115.8	119.3	117.2	115.6	115.5	116.9	3.0

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

TOTAL PAPER & PAPERBOARD PRODUCTION

seasonally adjusted



U.S. newsprint production exceeded its year-ago rate by 4.6% during the January - April period of 1991, but total North American shipments to the U.S. were down 4.7%. In response to weak advertising markets, newsprint consumption in all domestic end-uses trailed its year-ago rate by 8.1% in the first four months of 1991, while publisher inventories climbed from 38 days of supply in April of 1990 to 48 days of supply in April of this year.

Shipments of unbleached kraft papers gained 1.1% during the first four months of 1991, following an 11.3% setback from 1989 to 1990. The recent gains have been concentrated in the consumer bag grades and may reflect environmental considerations. Shipments of bleached kraft papers were down 13.9% through April 1991; total kraft paper shipments were off 1.5%.

Paperboard: Containerboard production for domestic use in the January-April period was up 0.2% relative to year ago, even while fiber box shipments were off 1.7%. Inventory building, however, supported production during the early part of this year. Containerboard inventories at box plants and mills, which had expanded by 280,000 tons in the final two months of 1990, grew an additional 320,000 tons in January of this year. They subsequently leveled off in February and declined by 215,000 tons in the March-April period. Consistent with these inventory swings, containerboard production for domestic use exceeded its year-ago volume by 4.7% during the first two months of 1991, but lagged 4.1% behind year-ago levels in the subsequent two months, leaving the four-month total up a slim 0.2%.

Bolstered by strong export growth, total containerboard production through April posted a 1.8% gain relative to its year-ago level. Production of linerboard for export was up 15.6%; corrugating medium for export, 27.1%.

Compared with the year-ago period, total folding boxboard production advanced 8.2% during the first four months of 1991. Exports, which accounted for 8.4% of the total, posted a 17.0% increase. Production of folding boxboard for domestic use was also up a strong 7.4%, even though several important folding box markets such as food, tobacco and clothing, have shown little or no growth since early 1990, suggesting that paperboard may be gaining relative to competitive materials.

Within the folding boxboard grade structure, unbleached kraft paperboard production exceeded its year-ago volume by 22.3% during the first four months of 1991 as a major capacity expansion helped pave the way for increased output. The overall gain in unbleached kraft folding boxboard production was supported by a 35% advance in exports and a 19.7% increase in production for domestic use. Production for export, which accounted for 14.9% of unbleached kraft folding boxboard output in 1990, was 19.0% of the total in the first four months of 1991.

Reflecting increased consumer demand for recycled products, production of recycled folding boxboard for domestic use posted a 6.4% increase through April 1991.

Production of solid bleached folding boxboard for domestic use climbed 2.6% over its January - April 1990 total in the first four months of 1991, while production for export advanced 2.7%.

Among the other boxboard grades, production of food service and milk carton board was about even with its year-ago volume; with production for domestic use up 2.8% and production for export off 7.2%. Total bleached paperboard production inched up 0.5%, but exports dropped 4.4%.

Production of recycled paperboard for non-boxboard uses such as tubes, cans and drums, gypsum wallboard, and panelboard, lagged its year-ago volume by 12% through April of 1991, largely reflecting weakness in construction and autos.

FIBROUS RAW MATERIALS

Production of chemical paper grade market pulp rose 7.6% through the first four months of 1991. Mills operated at 96% of capacity from January to April, compared to 94% for the same period last year; the U.S. was the only major pulp manufacturing country to improve its operating rate in 1991. Shipments of chemical paper grade market pulp gained 11.0%, with export deliveries contributing the entire 250,000-ton gain.

Consumption of waste paper at paper and paperboard mills, with a January - April gain of 3.8% over its year-ago total, continues to outpace the increase in wood pulp usage (see table on page 5). Inventories of waste paper held by paper and paperboard mills at the end of March were down 11.6% from year-ago levels; exports improved 6.5% in the first quarter.

U.S. WASTE PAPER EXPORT DEVELOPMENTS

U.S. waste paper exports, as reported by the Bureau of the Census, advanced 3.1% in 1990, to 5.9 million metric tons, according to a recent report by API's International Department. Last year's slower pace of export growth, when compared to the 6% increase in 1989 and the 18% average rate from 1985 to 1988, reflected a slowdown in the growth of world paper and paperboard production, as well as competitive wood pulp pricing.

The strongest reported gain in U.S. waste paper exports in 1990 -- 34.3% to 1.04 million metric tons -- was registered by mixed papers, a broad grouping of paper products recovered largely from offices. Nearly all of last year's increase in foreign demand originated in Canada, Mexico and Venezuela; U.S. exports of mixed papers to all other significant markets declined. Some of the reported gain, however, reflected statistical adjustments in the grade data.

Exports of old corrugated containers, which are mainly utilized in boxboard, corrugating medium and linerboard, fell 6.4% last year, to 2.48 million metric tons. Shipments to Mexico and Italy experienced the greatest absolute declines, collectively falling 329,000 metric tons (49%).

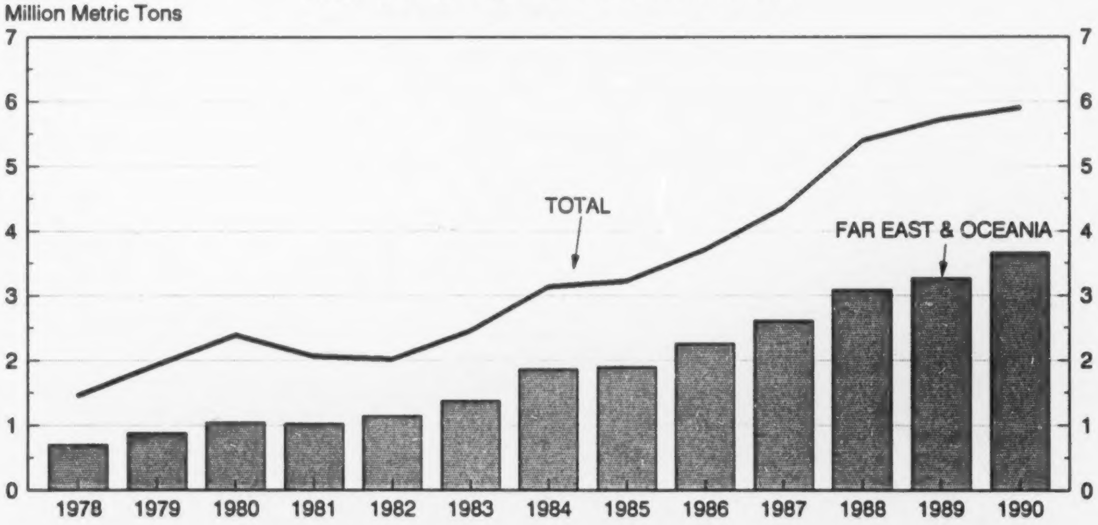
U.S. exports of high-value pulp substitutes grew 9.4% (107,000 metric tons) in 1990. Deliveries to the Far East & Oceania and Europe expanded by 221,000 metric tons, offsetting declines in shipments to other markets.

Exports of old newspapers, used to produce recycled newsprint, tissue and folding boxboard, slipped 1.9%. Purchases by Canada and Mexico were down nearly 50%, while shipments to Europe fell 29.1%.

The Far East & Oceania expanded its position as the primary export market for all grades of waste paper through the 1980's. U.S. shipments to these districts increased 12.1% from 1989 to 1991. Waste paper exports to all other regions declined 8.8%. The chart below portrays the development of waste paper exports to the Far East & Oceania countries in relation to total waste paper exports.

Copies of "U.S. Exports of Waste Paper in 1990" have been mailed to API member companies. The report is available to others for $75 (domestic) and $80 (foreign) from the API International Department.

U.S. EXPORTS OF WASTE PAPER



MONTHLY STATISTICAL SUMMARY INSERT

VOL. 69, NO. 5
MAY, 1991

PRODUCTION (000 TONS)

	(P) APR 1991	(R) MAR 1991	APR 1990	FIRST 4 MONTHS 1991	FIRST 4 MONTHS 1990	% CHANGE YR TO DATE 1991/1990
PAPER GRADES						
Newsprint	573	576	541	2,246	2,147	4.6
Printing & Writing	1,715	1,767	1,797	7,036	7,438	-5.4
Uncoated Groundwood (s)	130	147	140	554	585	-5.3
Coated Groundwood (s)	314	330	325	1,310	1,357	-3.4
Coated Free Sheet (s)	239	257	253	1,028	1,080	-4.8
Total Coated Paper (s)	553	587	578	2,338	2,437	-4.0
Uncoated Free Sheet Paper (s)	904	897	954	3,633	3,867	-6.0
Thin Paper (s)	16	18	17	71	91	-22.0
Cotton Fiber Paper (s)	13	14	14	53	57	-7.9
Bleached Bristols (s)	99	105	93	387	401	-3.5
Tissue Paper	477	505	467	1,927	1,892	1.8
Total Pkg & Other Paper	381	390	373	1,519	1,518	0.1
Unbl. Kraft Paper (s)	201	203	187	791	783	1.1
Bl. Kraft Paper (s)	34	36	41	140	163	-13.9
Specialty Pkg. Paper	48	50	44	196	178	10.3
Special Industrial Paper (s)	98	102	102	392	395	-0.7
TOTAL PAPER	3,146	3,239	3,178	12,729	12,995	-2.0
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,595	1,701	1,626	6,744	6,587	2.4
Unbleached Kraft Linerboard	1,478	1,582	1,531	6,280	6,188	1.5
Other Unbl. Kraft Paperboard	117	119	94	464	399	16.2
Semichemical Paperboard	463	469	466	1,883	1,871	0.6
Bleached Paperboard	379	390	380	1,519	1,512	0.5
Recycled Paperboard	730	767	751	2,953	3,000	-1.5
TOTAL PAPERBOARD	3,167	3,326	3,222	13,099	12,969	1.0
TOTAL PAPER AND PAPERBOARD	6,313	6,565	6,401	25,827	25,964	-0.5

	MAR 1991	FEB 1991	MAR 1990	FIRST 3 MONTHS 1991	FIRST 3 MONTHS 1990	% CHANGE 1991/1990
Dissolving & Special Alpha	124	104	123	343	337	1.9
Bleached Sulfite) Unbleached Sulfite)	120	123	127	372	391	-4.9
Bleached & Semi-Bl. Sulfate	2,362	2,229	2,297	7,023	6,857	2.4
Unbleached Sulfate	1,824	1,746	1,836	5,539	5,449	1.6
Semichemical	338	329	349	1,038	1,049	-1.1
Groundwood & Thermomechanical	547	503	500	1,613	1,539	4.8
TOTAL PULP DIVISION DATA	5,316	5,033	5,231	15,928	15,622	2.0

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA May 31, 1991	1989	1990	1991	1991 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD -- Tons (000)			FEBRUARY	MARCH	APRIL		
Total Production (API)......: excluding :......	76,785	78,785 R	6,132	6,565	6,313	77,482	-0.5
Total Seasonally Adjusted......: construction :......			6,504	6,316	6,409	77,515	-0.5
Imports (including Products)......: and wet :......E......	12,910	13,006	1,008	988	1,000	12,304	-7.4
Exports (including Products)......: machine :......E......	6,263	6,787	643	722	700	8,135	18.3
Apparent Consumption......: grades :......	83,432	85,004	6,868	6,582	6,709	81,685	-3.1
Paper Production % Tonnage Capacity......	93.0	93.2 R	90.5	88.1	87.7	89.4	-
Paperboard Production % Tonnage Capacity......	94.0	94.2	95.1	91.7	89.6	93.0	-
PAPER, PAPERBOARD AND PRODUCTS			JANUARY	FEBRUARY	MARCH		
Imports.....:Including Construction and :......	13,100	13,147	1,112	1,013	994	12,474	-6.3
Exports.....: WMB Grades (excl. HPB) :......	6,300	6,796	650	644	723	8,068	20.1
MARKET WOOD PULP PRODUCTION - Tons (000)......	8,664	8,798	764	757	744	9,057	3.5
TOTAL WOOD PULP PRODUCTION - Tons (000)......	61,998 f	63,068 f	5,579	5,033	5,316	63,710	2.0
WOOD PULP IMPORTS - TONS (000)......	5,005	4,893	423	430	400	5,013	-1.1
WOOD PULP EXPORTS - TONS (000)......	5,766 R	5,905	475	485	600	6,245	10.9
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS....: excluding :......			JANUARY	FEBRUARY	MARCH		
Wood Pulp......: consumption for :......	60,252	61,032	5,437	4,845	5,129	61,642	1.7
Waste Paper......: construction & :......	19,490	21,039	1,816	1,669	1,817	21,208	3.6
TOTAL......: WMB grades :......	79,742	82,071	7,254	6,513	6,945	82,850	2.3
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	98,414	99,194	8,801	8,115	8,161	100,308	0.3
EMPLOYMENT (000)			FEBRUARY	MARCH	APRIL		
Paper and Allied Products.........Total.......RS......	697.4	699.3	690.2	688.7	685.8	689.1	-0.9
Pulp, Paper and Board Mills........Total......A,RS......	245.6	245.2	242.1	241.3	240.6	241.8	-0.9
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			FEBRUARY	MARCH	APRIL		
Paper and Allied Products.......RS......	11.96	12.30	12.51	12.56	12.56	12.54	3.3
Pulp, Paper Mills...............A,RS......	14.72	15.18	15.32	15.42	15.43	15.36	2.7
Paperboard Mills...............E,RS......	14.76	15.25	15.49	15.49	15.51	15.51	3.2
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q3	1990 Q4	1991 Q1		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.72	16.74	14.02	13.07	12.60 Y	-24.6
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			FEBRUARY	MARCH	APRIL		
:IN PULP, PAPER :...Production Workers......RS......	125.9	128.9	130.0	126.7	129.9	129.2	0.4
:AND BOARD MILLS:...All Employees..........RS......	126.5	129.5	130.9	127.6	130.5	130.1	0.8
PAPER AND ALLIED PRODUCTS (Million $)			FEBRUARY	MARCH	APRIL		
Industry Shipments (Dept. of Commerce)*......	130,501	131,080	10,218	9,994	9,953	121,143	-6.6
Pulp, Paper and Paperboard*......	57,700	56,356	4,413	4,340	4,215	52,356	-5.4
Inventories (End of Period) - Total Industry*......	12,571	12,980	13,695	13,771	13,734	13,734	8.6
Pulp, Paper and Paperboard*......	4,980	5,305	5,530	5,603	5,628	5,628	12.6
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q2	1990 Q3	1990 Q4		
Sales (Corporations Only)......	113,573	114,686	28,844	28,862	28,446	N.D.	N.D.
Earnings (Corporations Only)......	7,047	4,844	1,630	1,246	579	N.D.	N.D.
Depreciation (Corporations Only)......	5,010	5,535	1,341	1,380	1,467	N.D.	N.D.
Net Worth (Corporations Only)......	45,642	46,462	45,597	46,185	46,462	N.D.	N.D.
PRICE INDEXES (Bureau of Labor Stats)1982=100			FEBRUARY	MARCH	APRIL		
Pulp, Paper & Products, ex. Building Grades......	132.4	132.9	132.5	131.9	130.7	131.9	-1.1
Wood Pulp......	157.4	151.2	132.9	126.7	125.7	129.7	-18.1
Waste Paper......	157.1	138.9	135.6	135.4	133.4	134.1	-10.1
Paper......	129.6	128.8	130.5	130.0	127.8	129.7	1.5
Paperboard......	140.1	135.7	132.1	130.2	128.3	130.8	-5.6
PAPER DEMAND (INDEXED: 1967=100)			FEBRUARY	MARCH	APRIL		
Total Paper Production *......	103.7	106.7	102.9	100.6	104.0	103.2	-2.1
Paper New Supply *......	102.4	104.6	99.1	98.9	80.8	95.7	-8.3
Demand Indicators - (Weighted Average) *......	107.8	110.1	108.8	108.2	107.9	108.6	-1.2
Production of Nondurable Goods.........*....(21.2%)......	106.4	107.8	106.0	105.4	105.2	105.9	-1.8
Disposable Income......*....(23.9%)......	107.2	108.1	106.7	107.1	106.9	106.9	1.5
Total Printing and Publishing.............*....(54.9%)......	108.6	111.9	110.7	109.7	109.3	110.5	-1.0
PAPERBOARD DEMAND (INDEXED: 1987=100)			FEBRUARY	MARCH	APRIL		
Total Paperboard Production *......	103.0	105.4	106.9	103.2	102.8	105.3	1.0
Production for Domestic Use	103.2	104.6	105.1	99.5	100.5	103.0	-0.2
Demand Indicators - (Weighted Average) *......	107.2	107.9	105.1	104.7	105.0	105.1	-2.0
Production of Consumer Goods...........*....(62.06%)......	106.6	107.3	105.0	106.0	105.4	105.3	-1.6
Production of Equipment......*....(5.75%)......	112.3	115.5	112.8	112.4	112.3	112.8	-0.8
Production of Materials......*....(32.19%)......	107.4	107.8	103.8	102.8	102.8	103.6	-3.2
MARKET DATA			JANUARY	FEBRUARY	MARCH		
Consumption by Publishers - Tons (000)......	13,493	13,368	1,020	944	1,060	12,094	-7.2
Newspaper Pub. and Printing Empl. Total(000)......	473	476	471	467	465	468	-1.5
Magazine Advertising Pages (PIB, Inc.)	181,995	174,706 R	9,485	12,840	13,328	142,613	-11.7
Wholesalers Sales and Inventories (Million $)			JANUARY	FEBRUARY	MARCH		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales......	50,015	51,454	4,419	3,807	3,865	48,444	-4.1
Inventories (End of Period)......	4,132	4,300	4,362	4,167	4,027	4,027	-1.8
FIBRE BOX DATA (Fibre Box Association)			FEBRUARY	MARCH	APRIL		
Fibre Box Shipments (Million square feet)......	313,400	318,102	24,137	24,520	28,033	312,390	-1.7
Container'bd Inventory at Mill & Plant (000 Tons)......	2,589	2,705	3,100	3,000	2,885	2,885	11.3
RETAIL TRADE (Billion $)							
Total Retail Sales *......	1,742	1,808	151.1	151.7	151.5	1,806	0.3
Nondurable Goods Stores Sales *......	1,069	1,153	97.9	97.7	97.3	1,169	3.2
GENERAL ECONOMIC DATA			FEBRUARY	MARCH	APRIL		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*......	108.1	109.2	105.7	105.0	105.1	105.6	-2.8
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)......	112.2	116.3	117.2	116.1	116.0	117.1	2.3
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)......	124.0	130.7	134.8	135.0	135.2	134.9	5.2
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q3	1990 Q4	1991 Q1		
G.N.P. or Expenditure - Current $......	5,201	5,465	5,515	5,527	5,562	5,562	3.5
G.N.P. or Expenditure - 1982 $......	4,118	4,157	4,170	4,153	4,127	4,127	-0.6
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	671	681	N.D. - No data available for 1991			649	

f - Wood Pulp Prod exc del., explo & scr. R - Revised RS - Revised series E - Last month estimated by API A - Est. by API Y - 1st quarter est. by Dept. of Commerce * Seasonally Adjusted

A2500-2

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.6 JUNE 1991

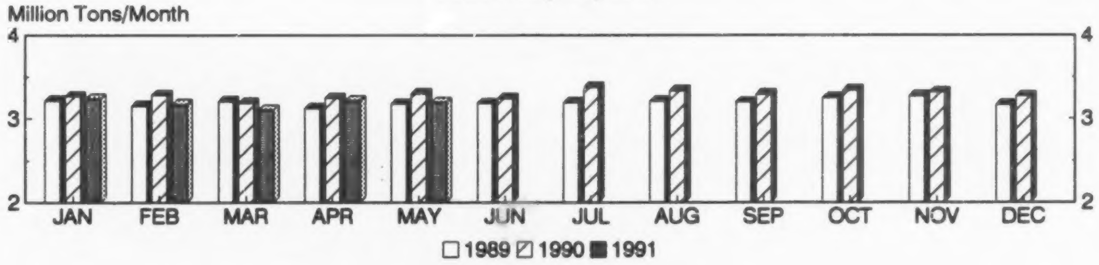
PAPER AND PAPERBOARD PRODUCTION: TREND REMAINS LEVEL

Total production of paper and paperboard is still below year-ago levels but month-to-month declines appear to have eased. The weakness has shifted from paper to paperboard: seasonally adjusted paper production in April and May was above the March rate, while paperboard output declined fractionally.

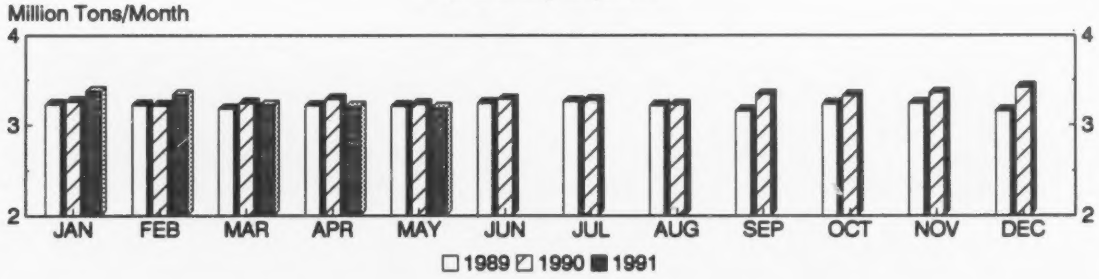
The value of industry shipments was 7.3% below its year-ago level in the January - May period, while the volume of shipments declined 0.8%. The Department of Commerce reports that aggregate first quarter pre-tax profits for paper and allied products companies were 40% below their comparable 1990 figure; sales were down by 4.8%. (See table at bottom of page 10.)

Despite sagging production volume, productivity measures are holding up well in 1991; plants have generally maintained employment levels but are temporarily shutting down unneeded capacity as demand slackens. This is consistent with the last production downturn in 1985, when the productivity of all employees rose 1.7% while that of production workers increased 2.7%.

TOTAL PAPER PRODUCTION
seasonally adjusted



TOTAL PAPERBOARD PRODUCTION
seasonally adjusted



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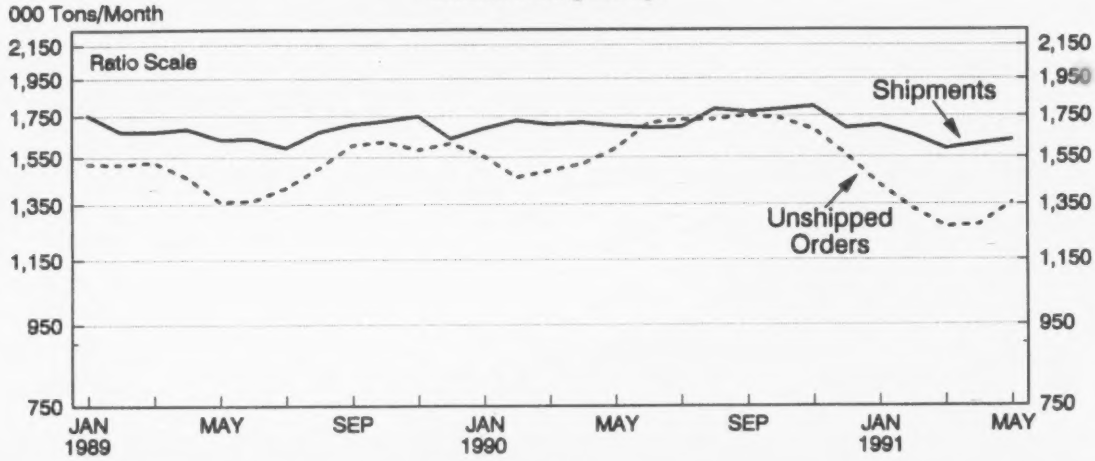
Paper: Recent data reveal evidence of a turnaround in printing-writing paper demand. Seasonally adjusted shipments of the major printing-writing grades (uncoated groundwood, free sheet, and coated papers) gained ground in April and May. Aggregate shipments of these grades, however, still lagged their year-ago volume by 4.9% during the first five months of 1991. After precipitously declining in the previous two quarters, unshipped orders of printing-writing papers turned upward in the second quarter of 1991. The chart below illustrates this development.

Printing/Writing Papers
(unc. groundwood, free sheet, coated papers)
2-month moving average



Although shipments of uncoated free sheet paper lagged their year-ago volume by 4.6% during the first five months of 1991, they gained ground in March, April and May. New orders for these grades have also been edging upward lately and exceeded shipments in both April and May. Foreign trade has been a source of strength for uncoated free sheet demand this year. According to Commerce Department data, exports exceeded their year-ago volume by 37% during the first four months of 1991, while imports were off 9.2%.

Coated paper shipments trailed their year-ago rate by 5.3% during the first five months of 1991, largely due to the weak advertising environment. Shipments were down to all major markets except exports. However, unshipped orders for coated papers rose 18% between the end of February and the end of May, providing a possible source of strength. Coated paper exports, at 242,000 tons per year, exceeded year-ago levels by 13.7% during the first four months of 1991, while imports, at 834,000 tons per year, were off 12.6%.

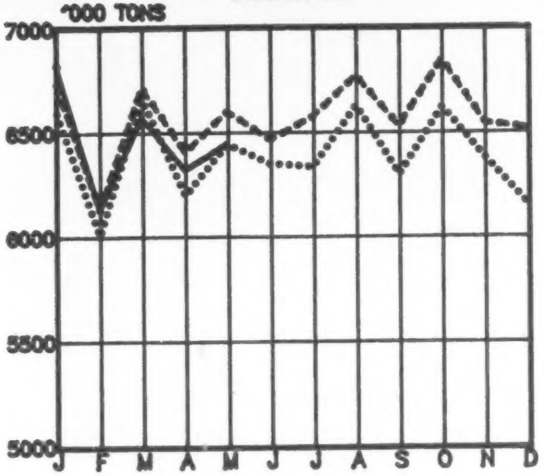
Groundwood paper shipments trailed their year-ago volume by 5.5% during the first five months of 1991. Exports, at 110,000 tons per year, were up a dramatic 49% relative to year-ago in the January-April 1991 period. At the same time, this was nearly matched by the tonnage gains in imports which rose 2.5%, to 1.4 million tons

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		FEB	MAR	APR (R)	MAY (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
	1989	1990	1991	1991	1991	1991	1991	
PAPER								
Newsprint – Production	6,088	6,610	522	576	573	574	6,770	4.8
– Shipments	6,079	6,621	513	583	553	574	6,680	3.0
Printing & Writing: Total Shipments	21,626	22,336	1,668	1,772	1,727	1,770	21,184	–4.9
Groundwood Paper – Shipments	1,743	1,764	133	147	130	130	1,643	–5.5
– New Orders	1,741	1,831	126	149	123	138	1,693	–0.4
– Unshipped Orders	193	151	229	233	228	227	227	50.7
Coated Groundwood – Shipments	4,059	4,233	314	330	314	321	3,916	–4.3
Coated Free Sheet – Shipments	3,157	3,303	250	257	239	244	3,053	–6.6
Total Coated Papers – Shipments	7,215	7,536	564	588	553	565	6,969	–5.3
– New Orders	7,171	7,438	517	597	581	624	7,053	–3.9
– Unshipped Orders	706	700	522	525	586	616	616	–12.1
Unctd Free Sheet – Shipments	11,081	11,475	852	902	913	949	11,041	–4.6
– New Orders	11,097	11,465	784	859	922	970	10,671	–9.2
– Unshipped Orders	748	809	545	482	517	533	533	–34.1
Thin Papers – Shipments	262	234	17	18	16	18	212	–18.7
Cotton Fiber Paper – Shipments	161	161	13	14	13	13	158	–8.2
Bleached Bristols – Shipments	1,164	1,166	89	105	101	96	1,161	–2.1
Tissue Paper – Production	5,636	5,802	459	505	477	472	5,758	0.6
Total Packaging & Other Paper	4,916	4,613	360	390	382	363	4,522	–1.7
Unbl. Kraft Paper – Shipments	2,681	2,377	186	203	207	186	2,360	–0.5
Bl. Kraft Paper – Shipments	468	484	36	36	34	33	416	–15.4
Specialty Pkg. Paper – Production	520	563	46	50	44	46	572	6.4
Special Industrial Paper – Shipments	1,248	1,190	93	102	96	97	1,174	–2.0
TOTAL PAPER PRODUCTION – UNADJUSTED	38,266	39,362	3,009	3,244	3,159	3,179	38,233	–2.1
TOTAL PAPER PRODUCTION – SEAS ADJ			3,171	3,101	3,214	3,195	38,200	–2.1
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,388	2,172	2,279	2,162	2,265	27,143	1.1
Cont'bd For Dom Use for Fibre Boxes	23,752	24,432	1,900	1,968	1,896	2,012	23,856	0.1
Total Linerboard	16,399	16,875	1,307	1,349	1,290	1,386	16,403	0.7
Unbleached Kraft	15,833	16,414	1,260	1,286	1,222	1,315	15,690	–1.1
Solid Bleached	178	139	10	12	12	12	142	1.7
Recycled	388	323	36	50	56	59	571	101.1
Corrugating Medium	7,339	7,549	592	618	603	624	7,434	–1.3
Semichemical	5,554	5,567	434	454	447	456	5,473	–1.2
Recycled	1,785	1,982	158	164	155	167	1,961	–1.7
Container Chip and Filler	14	7	1	2	2	2	19	86.0
Other Containerboard for Dom Use	307	282	21	26	25	22	276	–8.1
Containerboard for Export	2,369	2,674	251	285	242	231	3,011	11.1
Boxboard	12,092	12,035	954	1,047	999	1,004	12,125	–0.9
Boxboard for Packaging for Dom Use	7,076	6,949	578	636	612	596	7,340	4.5
Folding Boxboard	5,370	5,198	440	482	465	453	5,561	6.6
Solid Bleached	1,980	1,818	148	162	166	166	1,938	3.5
Unbleached Kraft	987	970	93	93	93	87	1,098	16.4
Recycled	2,403	2,410	199	227	207	200	2,525	5.3
Set-up Boxboard for Dom Use	288	290	22	23	21	22	266	–16.7
Milk Carton & Food Service Dom Use	1,419	1,461	117	131	125	123	1,513	1.5
Other Boxboard for Domestic Use	4,152	4,145	291	318	298	310	3,711	–12.1
Boxboard for Export	863	941	86	94	89	97	1,074	8.7
Paperboard Production by Furnish	38,519	39,423	3,126	3,326	3,161	3,269	39,268	0.5
Unbleached Kraft	19,490	20,357	1,624	1,701	1,586	1,660	20,147	1.5
Semichemical	5,691	5,710	453	469	463	472	5,653	–0.6
Solid Bleached Kraft	4,521	4,399	359	390	383	393	4,596	1.8
Recycled	8,817	8,956	690	767	730	743	8,871	–1.7
Paperboard Production for Export	3,232	3,615	336	379	331	328	4,085	10.4
Unbleached Kraft	2,363	2,691	251	296	247	237	3,084	12.5
Semichemical	138	142	18	15	15	16	180	19.9
Bleached Kraft	693	732	64	63	66	71	770	0.9
Recycled	38	49	3	5	4	4	51	12.7
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,519	39,423	3,126	3,326	3,161	3,269	39,268	0.5
TOTAL PAPERBOARD PROD – SEAS ADJ			3,336	3,220	3,203	3,189	39,174	0.5
PAPER AND PAPERBOARD – UNADJ	76,785	78,785	6,135	6,570	6,320	6,448	77,501	–0.8
PAPER AND PAPERBOARD – SEAS ADJ			6,507	6,321	6,416	6,384	77,375	–0.8

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

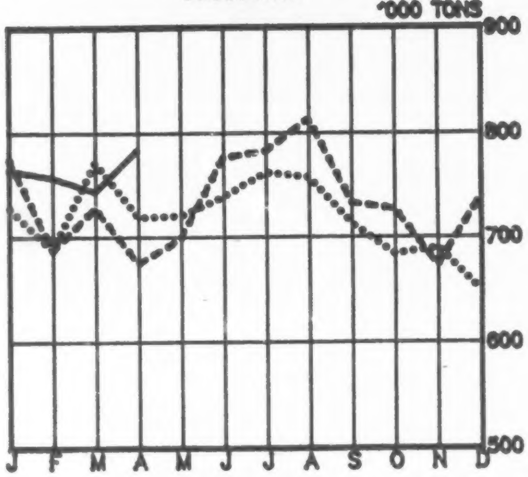
TOTAL PAPER AND PAPERBOARD

PRODUCTION



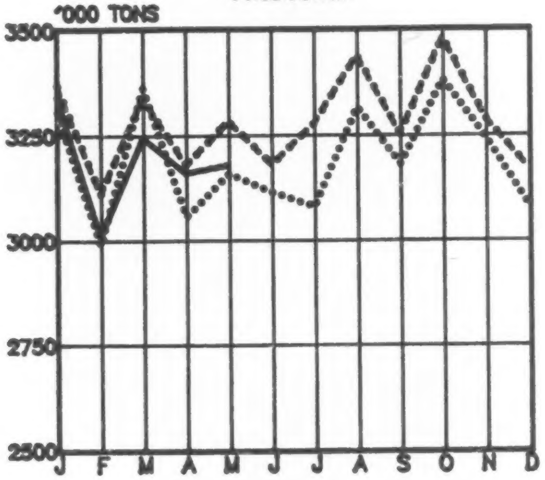
MARKET WOOD PULP

PRODUCTION



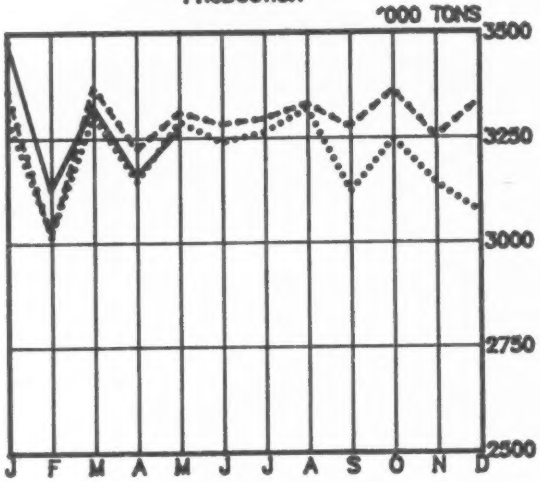
TOTAL PAPER

PRODUCTION



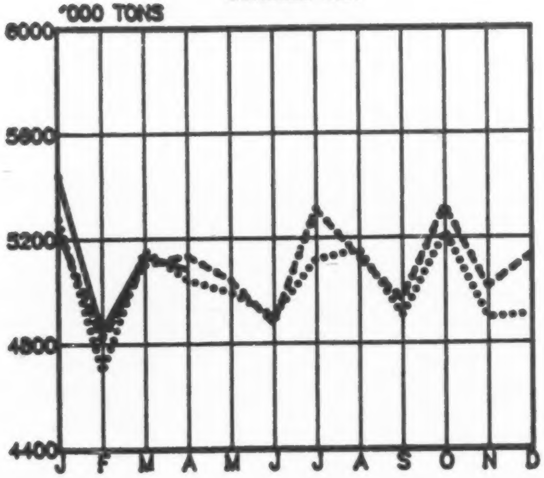
TOTAL PAPERBOARD

PRODUCTION



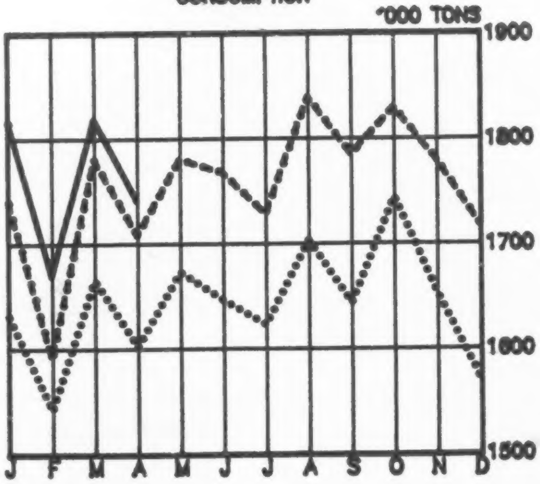
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 ········ 1990 - - - - - - 1991 ————

WOOD PULP STATISTICS (Thousands of Tons)			YEAR		JAN	FEB	MAR (R)	APR (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
			1989	1990	1991	1991	1991	1991	1991	
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,998	63,068	5,579	5,033	5,319	5,285	63,649	1.8
	Imports	A	5,005	4,893	423	430	400	415	5,006	-0.9
	Exports	#	5,766	5,905	475	485	600	528	6,268	7.4
	New Supply		61,237	62,056	5,526	4,978	5,119	5,172	62,386	1.1
Dissolving Pulp	Production		1,425	1,293	115	104	124	115	1,374	5.4
	Imports		284	222	10	18	7	18	158	-30.2
	Exports	#	798	782	52	64	70	50	708	-6.3
	New Supply		912	733	73	58	61	83	823	6.5
Paper Grades Chemical Pulp	Production		50,181	51,192	4,530	4,098	4,310	4,270	51,623	1.8
	Imports	A	4,370	4,326	387	386	363	370	4,517	1.5
	Exports	#	4,913	5,080	422	418	524	475	5,522	9.9
	New Supply		49,639	50,438	4,494	4,065	4,149	4,164	50,619	1.0
Groundwood and Thermo-Mech	Production		6,029	6,363	563	503	547	555	6,503	4.7
	Imports	A	351	345	26	26	31	27	331	-11.6
	Exports	#	55	44	1	3	6	3	38	-34.4
	New Supply		6,324	6,665	589	526	571	579	6,795	4.1
Semi-Chemical	Production		4,363	4,219	371	329	338	346	4,149	-3.3
	Imports									
	Exports									
	New Supply		4,363	4,219	371	329	338	346	4,149	-3.3
MARKET WOOD PULP										
Total Market Wood Pulp	Production		8,664	8,798	764	757	743	783	9,140	6.5
	Imports		3,539	3,045	249	263	218	265	2,987	-6.2
	Exports		5,309	5,561	435	476	562	479	5,858	14.2
	New Supply		6,893	6,282	577	544	399	569	6,268	-5.6
Dissolving Pulp	Production		1,422	1,292	115	104	123	115	1,370	5.2
	Imports		210	232	19	17	18	19	218	-8.0
	Exports		821	782	58	62	75	51	737	-0.6
	New Supply		810	742	77	58	66	83	850	6.7
Paper Grades Chemical Pulp	Production		7,242	7,506	649	653	620	669	7,770	6.7
	Imports		3,072	2,813	229	247	200	246	2,769	-6.0
	Exports		4,489	4,779	378	414	487	428	5,122	16.7
	New Supply		5,825	5,540	500	486	333	487	5,417	-7.3
Groundwood Pulp and All Other	Production		0	0	0	0	0	0	0	N.M.
	Imports		258	0	0	0	0	0	0	N.M.
	Exports		0	0	0	0	0	0	0	N.M.
	New Supply		258	0	0	0	0	0	0	N.M.

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

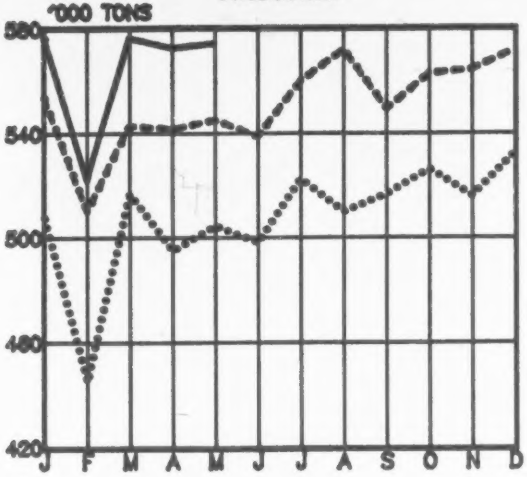
NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. N.M. – Not Meaningful. # – 1989 Exports revised by API.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR		JAN	FEB	MAR (R)	APR (P)	Annual Rate	% Change From Same Period Last Year
	1989	1990	1991	1991	1991	1991	1991	
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,072	7,252	6,513	6,951	6,820	82,609	1.6
Total Wood Pulp	60,252	61,032	5,437	4,845	5,133	5,080	61,484	1.1
Waste Paper	19,490	21,040	1,815	1,669	1,818	1,740	21,125	3.3
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	201	216	216	198	198	0.8
Producers' Market Inventories	342	476	521	554	483	521	521	14.6
Consumers' Purchased Inventories #	519	392	419	409	406	394	394	-8.7
Waste Paper at Paper & Bd. Mills	1,082	909	927	917	905	959	959	-3.4
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	26	27	23	24	24	9.1

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # includes all grades of wood pulp
P – Preliminary; R – Revised; 0 – indicates zero to five-hundred short tons

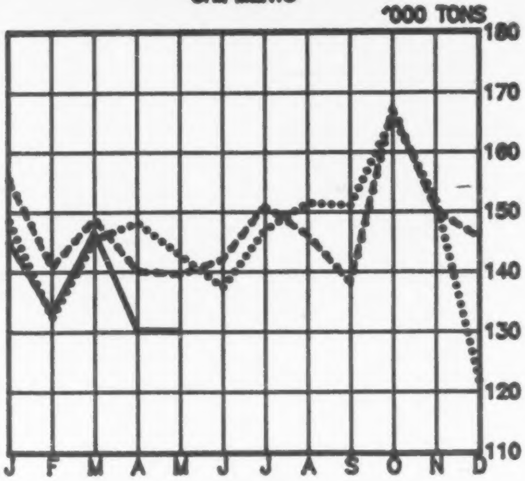
NEWSPRINT

PRODUCTION



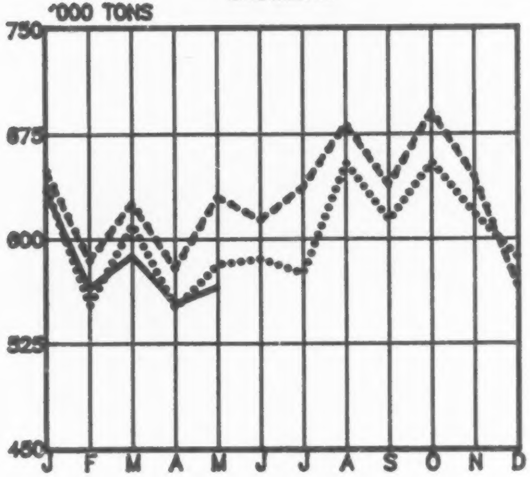
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



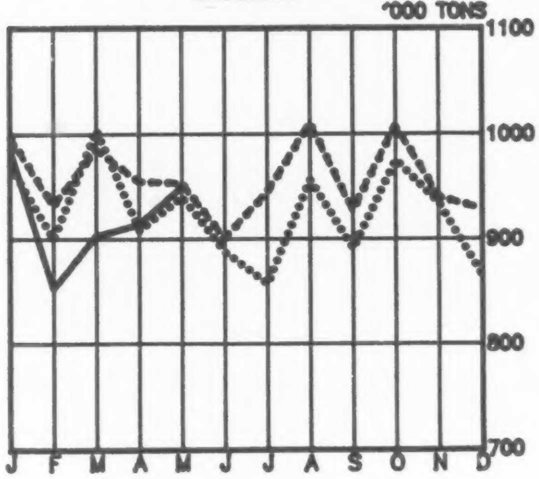
COATED PAPER

SHIPMENTS



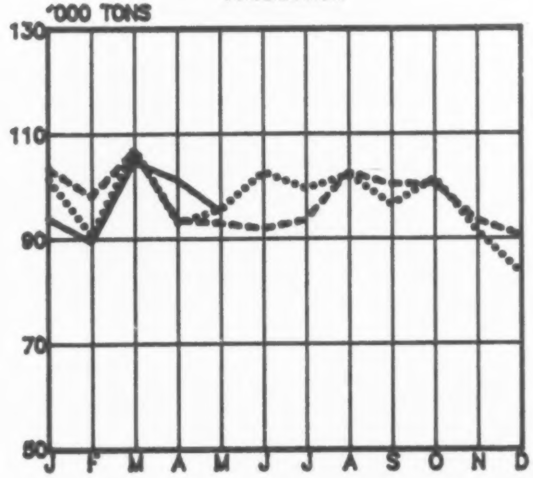
UNCOATED FREE SHEET PAPERS

SHIPMENTS



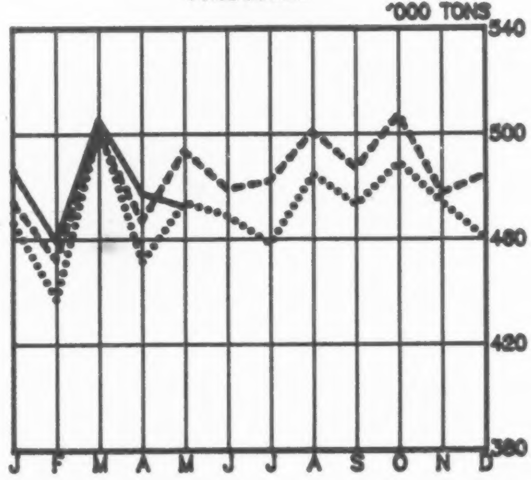
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1989 ········ 1990 ------ 1991 ——

FIBROUS RAW MATERIALS Thousands of Standard (128 Cu. ft.) Cords	YEAR 1989	YEAR 1990	JANUARY 1991	FEBRUARY 1991	MARCH 1991	APRIL 1991	ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,279	99,304	8,779	8,171	8,181	8,097	99,624	-0.4
– Total Consumption	96,414	99,194	8,601	8,115	8,181	8,271	100,044	0.3
– Residues *	34,639	35,727	2,969	2,777	2,856	2,937	34,617	-3.4
– Inventories	5,462	5,961	5,732	5,554	5,670	5,062	5,062	-2.4
So. Atlantic – Total Receipts	31,982	32,536	2,792	2,631	2,518	2,668	31,797	-4.6
– Total Consumption	32,239	32,412	2,863	2,859	2,641	2,907	32,596	-0.8
– Residues *	9,981	11,181	891	864	858	876	10,737	-4.2
– Inventories	936	1,334	1,257	1,291	1,194	1,183	1,183	12.9
Northeast – Total Receipts	7,242	7,294	694	665	635	676	7,680	4.4
– Total Consumption	7,072	7,060	569	590	603	582	7,092	-4.9
– Residues *	1,575	1,505	146	140	145	139	1,710	13.1
– Inventories	622	449	504	531	523	465	465	-1.1
South Central – Total Receipts	35,840	37,248	3,467	2,893	3,296	3,136	38,469	6.2
– Total Consumption	35,791	36,764	3,431	3,079	3,148	3,109	38,301	8.8
– Residues *	10,639	11,616	1,026	923	983	1,019	11,889	6.0
– Inventories	1,336	1,679	1,716	1,472	1,629	1,432	1,432	17.1
North Central – Total Receipts	7,020	7,074	748	709	675	464	7,486	5.9
– Total Consumption	6,963	7,129	647	597	605	642	7,473	4.1
– Residues *	1,422	1,308	93	100	101	105	1,197	-9.7
– Inventories	936	1,014	1,113	1,144	1,203	1,029	1,029	15.5
West – Total Receipts	17,195	15,184	1,078	1,163	1,197	1,282	14,160	-8.5
– Total Consumption	16,349	15,769	1,266	1,190	1,184	1,241	14,643	-9.4
– Residues *	11,042	10,217	711	750	759	796	9,064	-13.1
– Inventories	1,730	1,265	1,143	1,116	1,121	973	973	-36.3

SOURCE: American Pulpwood Association

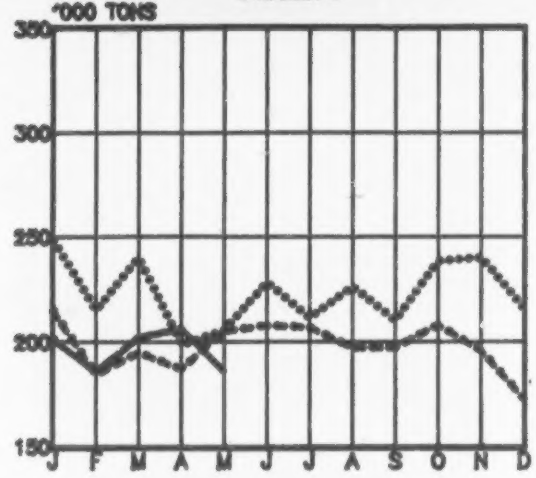
* – Consumption of Residues in cords equivalent

UNITED STATES TRADE WITH CANADA	IMPORTS FROM CANADA YEAR 1990 Tons	($000)	MARCH 1991 Tons	($000)	APRIL 1991 Tons	($000)	ANNUAL RATE Y-T-D 1991 Tons	% CHANGE FROM SAME PD LAST YEAR
Pulpwood, Roundwood (in cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood chips	709,197	22,413	49,166	1,353	65,614	2,131	679,442	-2.8
Wood Pulp, Total	4,322,418	2,514,301	368,563	178,262	339,295	158,833	4,323,829	-5.2
Waste Fibrous Materials, Total	130,452	31,442	12,893	3,052	13,179	2,967	132,062	-8.2
Paper, Board & Products, Total	11,191,700	6,317,690	867,202	516,736	866,184	512,466	10,836,546	-7.1
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	11,047,032	5,986,426	845,176	485,365	853,241	479,651	10,491,938	-7.1
Paper, Paperboard & Products	11,066,239	6,284,416	862,223	515,400	860,172	510,676	10,573,690	-6.8
Paper & Paperboard, Only	10,921,571	5,935,250	840,166	484,030	847,229	476,029	10,429,993	-6.8
Paper, Total	10,385,505	5,723,101	798,142	466,510	803,983	460,376	9,901,062	-7.5
Newsprint	8,118,161	4,162,493	623,778	345,754	621,310	336,902	7,729,711	-8.9
Printing, Writing & Rel. Pap.	1,914,083	1,296,073	146,440	101,258	158,697	105,239	1,884,654	-0.5
Pack. & Ind. Conv. Paper	211,903	121,069	17,461	10,483	18,434	10,275	206,424	-3.6
Special Industrial Paper	57,441	68,444	3,730	4,747	3,240	4,994	41,267	-36.9
Tissue Paper	83,917	76,023	4,731	4,269	4,262	3,964	56,777	-10.5
Paperboard, Total	536,067	212,149	42,055	17,520	43,246	17,653	528,941	9.0
Convtd Paper&Paperbd Products	144,666	349,166	12,027	31,370	12,943	32,846	143,606	-6.7
Wet Machine Board	664	757	36	36	54	48	742	-22.9
Construction Paper & Board	124,576	32,418	4,941	1,299	5,959	1,574	61,293	-44.4

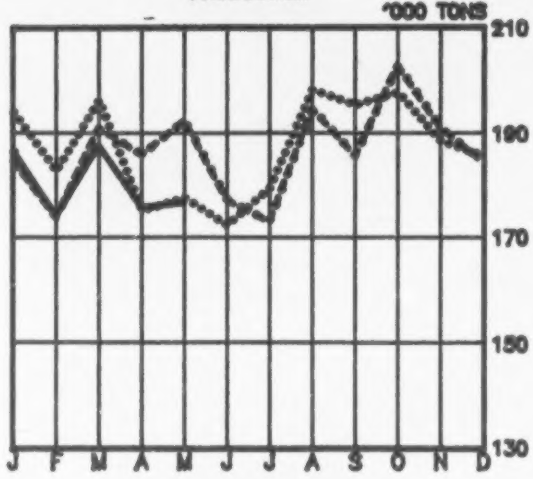
EXPORTS TO CANADA								
Pulpwood, Roundwood (in cubic meters)	1,039,727	36,801	201,026	5,623	69,246	1,636	2,162,693	461.7
Pulpwood chips	193,641	9,066	17,853	578	26,097	1,207	236,266	37.8
Wood Pulp, Total	326,456	165,508	27,906	11,814	23,530	10,748	290,227	-24.8
Cotton Pulp & Other Pulp	4,373	4,284	418	365	374	370	5,100	19.0
Waste Paper	663,204	118,346	47,534	8,911	53,373	10,224	546,062	-2.1
Paper, Board & Products, Total	1,194,630	1,317,384	112,537	126,306	122,665	136,306	1,367,172	16.0
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	84,821	81,242	92,236	86,352	1,035,175	15.3
Paper, Paperboard & Products	1,192,443	1,315,696	112,366	126,220	122,234	130,065	1,364,626	15.9
Paper & Paperboard, Only	890,912	818,690	84,682	81,164	91,786	85,111	1,022,629	15.2
Paper, Total	521,586	596,662	66,017	63,682	59,605	65,966	646,666	25.6
Newsprint	20,813	11,369	1,584	1,148	2,715	1,966	24,861	22.6
Printing, Writing & Rel. Pap.	372,682	424,257	40,630	45,990	41,512	45,620	456,140	19.5
Pack. & Ind. Conv. Paper	52,367	36,'60	6,361	3,901	5,746	4,136	63,157	26.6
Special Industrial Paper	59,301	106 279	5,360	9,833	5,784	10,658	63,290	6.5
Tissue Paper	16,353	17,297	2,762	2,810	3,696	4,027	39,560	207.3
Paperboard, Total	369,326	221,636	28,665	17,572	32,160	19,115	375,661	3.1
Convtd Paper&Paperbd Products	301,531	497,106	27,717	45,066	30,446	50,864	331,967	16.1
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,669	139	86	461	241	2,946	66.3

SOURCE: Bureau of Census, Department of Commerce .

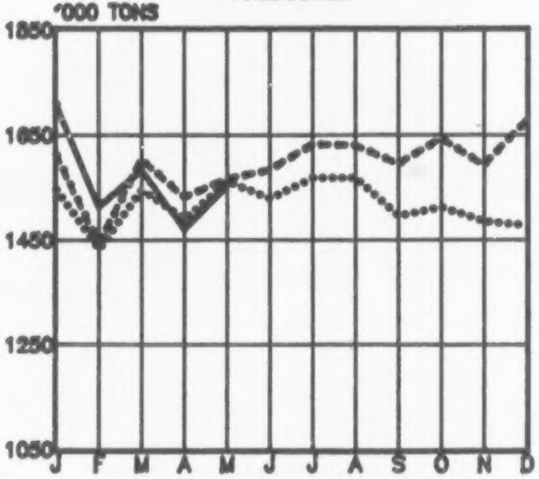
UNBLEACHED KRAFT PACKAGING
AND INDUSTRIAL CONVERTING PAPER
SHIPMENTS



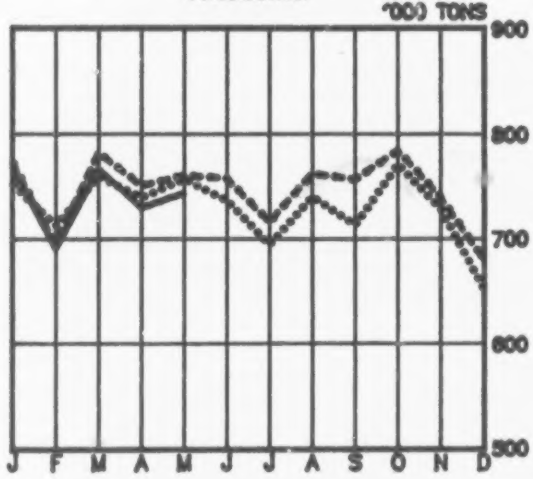
OTHER PAPER
PRODUCTION



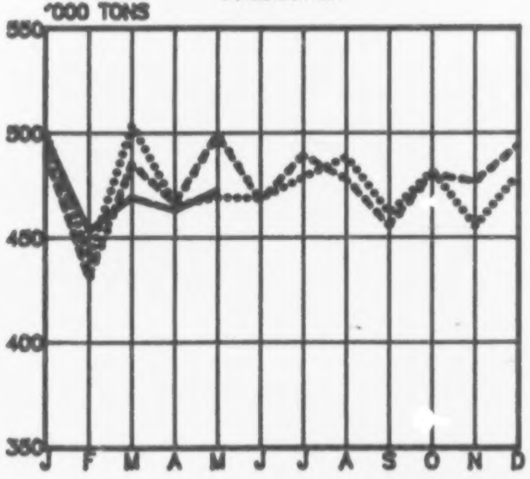
UNBLEACHED KRAFT LINERBOARD
PRODUCTION



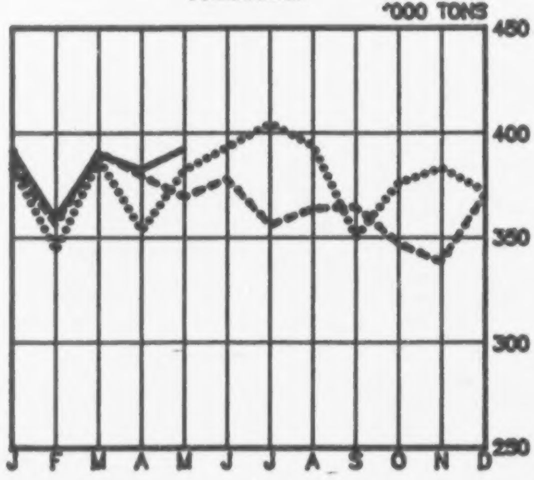
RECYCLED PAPERBOARD
PRODUCTION



SEMICHEMICAL PAPERBOARD
PRODUCTION



SOLID BLEACHED PAPERBOARD
PRODUCTION



1989 ········ 1990 - - - - - 1991 ——

PULP, PAPER AND PAPERBOARD IMPORTS	YEAR 1990		MARCH 1991		APRIL 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood Chips	710,415	22,550	49,166	1,353	65,814	2,131	690,272	-2.8
Total All Imports	18,177,409	11,292,256	1,407,742	863,781	1,433,160	857,066	17,516,466	-5.9
Wood Pulp Total	4,893,355	2,831,327	400,238	191,622	415,359	191,296	5,005,754	-0.9
Waste Paper	122,539	26,349	13,219	3,078	13,115	2,821	136,785	2.3
Other Fibrous Materials	14,037	9,286	590	392	732	431	7,831	-51.9
Paper Board & Products Total	13,147,479	8,425,293	993,696	668,689	1,003,963	662,538	12,367,097	-7.8
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	12,728,780	7,425,583	962,094	592,926	971,863	583,158	11,969,704	-7.8
Paper Ppbd & Prds ex Cnst&WMB	13,006,238	8,382,641	987,873	666,759	997,267	660,491	12,296,077	-7.4
Paper & Paperboard Only	12,587,519	7,382,931	956,271	590,997	965,286	581,110	11,898,773	-7.5
Paper Total	11,961,306	7,077,036	906,985	566,966	916,300	557,891	11,292,966	-8.1
Newsprint	8,299,557	4,247,131	632,746	350,015	639,156	343,467	7,879,837	-9.2
Printing & Writing	3,104,863	2,248,424	234,114	173,013	236,286	170,015	2,930,966	-4.4
Uncoated Groundwood	1,337,581	843,550	109,997	71,645	117,188	75,254	1,367,102	2.5
Coated Print.& Imprsg. Pap.	936,046	749,082	66,079	56,832	69,021	66,564	833,777	-12.6
Uncoated Free Sheet	752,448	564,479	50,731	37,056	44,631	30,473	639,026	-9.2
Thin (except Cigarette)	11,365	14,296	1,268	1,365	1,513	1,752	15,351	29.4
Bristols	67,424	77,017	6,039	7,116	5,933	6,962	75,711	21.6
Total Pkg & Other Paper	425,697	462,237	33,504	37,956	33,304	39,341	393,023	-8.7
Unbleached Kraft Paper	235,352	116,655	19,547	9,770	18,346	9,216	228,176	0.5
Other Pkg. & Indust. Paper	190,345	345,582	13,957	28,186	14,958	30,125	164,847	-18.9
Tissue	131,189	119,244	6,621	5,961	6,553	5,067	89,140	-17.7
Paperboard, Total	626,213	305,895	49,286	24,031	48,966	23,220	605,807	4.7
Test or Containerboard	113,629	48,929	7,721	3,084	6,523	2,715	65,892	-36.6
Semi-Chemical Corrugating	111,935	31,152	3,646	870	4,376	1,148	66,844	-40.5
Other Paperboard	400,649	227,180	37,919	20,076	38,068	19,356	453,071	36.9
Convtd Paper&Paperbd Products	418,719	999,710	31,602	75,763	31,980	79,380	397,303	-6.3
Paper Products, Total	313,106	807,967	23,600	59,976	22,997	63,008	299,936	-8.2
Paperboard Products, Total	105,613	191,744	8,002	15,787	8,983	16,372	97,367	0.1
Wet machine Board	1,132	991	61	53	91	86	966	-17.7
Construction Paper & Board E	140,110	41,661	5,762	1,876	6,606	1,962	70,034	-43.2
Notes								
Other: No Weight Avail. ($000)		136,809		7,454		9,673	108,483	-2.1
Total Imports Incl. Other($000)		11,429,064		871,235		866,750	10,707,109	-6.1

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		MARCH 1991		APRIL 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	1,122,468	39,971	204,385	5,906	61,425	1,819	2,185,518	386.0
Pulpwood Chips	4,637,659	412,018	385,253	36,719	396,386	37,257	5,047,997	28.5
Total All Exports	19,352,011	9,075,342	1,836,488	864,415	1,642,395	844,491	21,309,393	11.3
Wood Pulp,Total	5,905,339	3,155,671	600,381	273,261	528,095	246,217	6,267,931	7.4
Cotton Pulp and Other Pulp	135,632	104,806	8,701	7,515	8,094	7,204	103,767	3.5
Waste and Old Paper	6,514,652	779,667	504,690	61,942	621,164	70,427	6,831,243	8.1
Paper, Board & Products,Total	6,790,388	5,035,177	722,716	521,697	685,042	520,643	8,106,452	17.7
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	619,895	362,860	572,647	347,096	6,840,042	16.9
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,663	721,861	521,111	683,374	519,720	8,085,120	17.5
Paper & Paperboard, Only	5,738,750	3,443,249	619,039	362,274	570,979	346,172	6,818,710	16.7
Paper, Total	1,519,052	1,455,104	166,467	156,702	176,700	159,668	1,853,919	22.2
Newsprint	535,993	293,182	57,935	33,530	59,830	32,166	611,965	16.6
Printing & Writing	664,824	717,700	73,290	76,757	75,762	77,790	845,568	23.3
Uncoated Groundwood	75,299	63,574	8,566	7,267	11,760	9,161	110,030	48.7
Clay Coated Paper	218,684	215,289	22,316	21,130	19,972	19,191	242,168	13.7
Uncoated Free Sheet	232,369	306,127	26,476	34,196	30,313	36,049	333,370	37.3
Other Printing & Writing	138,472	132,709	15,937	14,162	13,706	13,369	159,989	2.4
Total Pkg. & Other Paper	283,584	403,949	30,404	40,912	34,290	42,979	334,290	23.1
Unbleached Kraft	112,828	60,480	13,222	8,354	14,573	7,606	135,185	22.1
Other Pkg. & Indust. Paper	170,756	343,469	17,182	32,558	19,667	35,374	199,105	23.7
Tissue	34,851	40,273	4,836	5,504	6,849	6,734	62,056	79.2
Paperboard, Total	4,219,698	1,988,144	452,573	205,572	394,279	186,504	4,964,791	14.8
Solid Wood Pulp	3,993,101	1,867,502	435,184	196,051	376,778	176,744	4,741,182	15.7
Total Linerboard	2,924,140	1,076,705	326,541	118,913	261,902	95,929	3,451,971	14.6
Bleached Kraft Linerboard	335,444	150,819	36,971	17,936	25,710	14,156	400,667	22.3
Unbleached Kraft Linerbd	2,588,697	925,886	287,570	100,977	236,192	81,773	3,051,305	13.7
Other Unbleached Kraft	253,945	144,169	38,142	22,217	37,287	21,058	400,727	47.4
Other Bleached Kraft	764,550	628,859	66,031	53,422	69,345	57,004	820,016	5.4
Semi-Chemical Corrugating	50,406	17,769	4,469	1,499	8,245	2,753	66,466	80.3
Recycled Paperboard	226,598	120,643	17,389	9,522	17,501	9,760	223,609	-1.4
Convtd Paper&Paperbd Products	1,047,768	1,585,436	102,822	158,837	112,395	173,547	1,266,410	22.3
Paper Products, Total	440,793	1,012,642	48,268	107,340	51,630	116,835	558,758	34.8
Paperboard Products, Total	606,975	572,793	54,554	51,497	60,766	56,712	707,653	13.9
Wet Machine Board	467	232	33	23	46	27	361	-69.4
Construction Paper & Board E	9,364	6,262	823	863	1,022	997	20,972	169.1
Notes								
Other: No Weight Avail. ($000)		49,964		4,174		5,630	56,033	33.4
Total Exports Incl. Other($000)		9,125,306		868,589		850,121	9,845,139	6.3

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year–To–Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR 1989	YEAR 1990	FEB 1991	MAR 1991	APR 1991	MAY 1991	Annual Rate Y-T-D 1991	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	132.4	132.9	132.5	131.9	130.7	129.9	131.5	-1.3
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	132.4	131.6	130.7	129.9	131.5	-1.2
Total Wood Pulp	157.4	151.2	132.9	126.7	125.7	122.5	128.1	-18.7
Total Paper	129.6	128.8	130.5	130.0	127.8	127.1	129.2	1.1
Writing Paper, exc. Newsprint	130.5	129.1	129.7	128.8	126.2	124.8	127.9	-0.2
Newsprint	122.5	119.6	126.8	126.9	121.3	122.1	124.8	7.6
Total Paperboard	140.1	135.7	132.1	130.2	128.3	127.0	130.0	-5.8
Total Paper and Paperboard *	132.9	131.0	131.0	130.1	128.0	127.1	129.5	-1.2
Converted Products	131.7	135.1	136.1	136.2	135.6	135.2	135.9	0.7
Waste Paper	157.1	138.9	135.6	135.4	133.4	128.8	133.3	-9.7
All Commodities	112.2	116.3	117.2	116.1	116.0	116.5	117.0	2.2
Industrial Commodities	111.6	115.8	117.2	115.6	115.5	116.1	116.7	2.8

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

PAPER AND ALLIED PRODUCTS INDUSTRY
SALES, EARNINGS AND BALANCE SHEET DATA
1982 – 1991
(Millions of Dollars)

	Net Sales	Net Profit Before Taxes	Net Profit Before Taxes to Net Sales (%)	Taxes	Net Profit After Taxes	Net Profit After Taxes to Net Sales (%)	Stock-holders Equity	Return on Equity (%)	Long-term Debt	Total Assets
1982	60,293	2,120	3.5	660	1,460	2.4	26,705	5.5	13,149	52,915
1983 C	66,100	3,439	5.2	1,102	2,337	3.5	27,509	8.5	13,946	56,126
1983 R	65,008	3,424	5.3	1,096	2,327	3.6	27,219	8.5	13,565	54,821
1984	71,891	4,812	6.7	1,798	3,015	4.2	28,160	10.7	13,802	58,520
1985 C	71,761	4,424	6.2	1,533	2,891	4.0	29,780	9.7	15,262	62,613
1985 R	71,465	4,399	6.2	1,519	2,880	4.0	29,694	9.7	15,262	62,505
1986 C	74,896	5,318	7.1	2,025	3,293	4.4	31,254	10.5	18,920	69,132
1986 R	74,844	5,298	7.1	2,018	3,280	4.4	31,221	10.5	18,906	69,062
1987 C	86,603	8,077	9.3	3,088	4,989	5.8	35,162	14.2	20,152	76,791
1987 R	95,576	8,860	9.3	3,338	5,520	5.8	39,217	14.1	22,417	85,279
1988 C	107,014	12,204	11.4	4,127	8,077	7.5	42,933	18.8	27,067	95,295
1988 R	107,221	12,210	11.4	4,129	8,081	7.5	42,940	18.8	27,180	95,444
1989 C	112,238	10,771	9.6	3,771	7,000	6.2	45,888	15.3	33,193	107,572
1989 R										
First Quarter	110,376	12,172	11.0	4,184	7,992	7.2	43,811	18.2	29,016	98,562
Second Quarter	115,448	14,412	12.5	4,344	8,068	7.0	44,954	17.9	31,248	102,895
Third Quarter	113,824	11,876	10.4	4,388	7,488	6.6	46,246	16.2	32,909	105,834
Fourth Quarter	114,644	7,000	6.1	2,360	4,640	4.0	45,642	10.2	34,543	109,038
Total	113,573	11,365	10.0	3,819	7,047	6.2	45,642	15.4	34,543	109,038
1990 C	114,686	7,187	6.3	2,343	4,844	4.2	46,462	10.4	39,961	116,812
1990 R										
First Quarter	115,176	8,784	7.6	2,968	5,816	5.0	47,950	12.1	37,970	115,368
Second Quarter	116,072	9,268	8.0	2,868	6,400	5.5	44,977	14.2	37,777	111,721
Third Quarter	116,148	7,524	6.5	2,668	4,856	4.2	45,601	10.6	39,292	114,134
Fourth Quarter	114,696	3,368	2.9	908	2,456	2.1	45,951	5.3	40,720	117,335
Total	115,523	7,236	6.3	2,353	4,882	4.2	45,951	10.6	40,720	117,335
1991 C										
First Quarter	109,600	5,092	4.6	1,624	3,468	3.2	46,717	7.4	42,389	118,233

NOTE: Quarterly data are at annual rates. C=Consistent with the previous year's final total.
R=Revised to reflect changes in the number of companies classified to this industry.

SOURCE: Quarterly Financial Report for Manufacturing, Mining, and Trade Corporations – Bureau of the Census, U.S. Department of Commerce.

a year. Overall, net imports of uncoated groundwood declined at an annual rate of 2,700 tons between the first four months of 1990 and the corresponding 1991 period. (See page 12 for a discussion of commercial printing markets.)

Among the other paper grades, newsprint production continues to expand. The May year-to-date total was 4.8% above that in 1990. This gain can be traced to the effects of increased domestic capacity - with a large component of fiber from recycled newsprint - and a 9% drop in newsprint imports.

Tissue paper production is moving along a slow growth trend. Its five-month 1991 total is 0.6% ahead of its 1990 rate, following consecutive 2.9% annual gains since 1989. Note: In both 1989 and 1990, the rate of increase picked up in the second half of the year.

Shipments of kraft papers fell 3.1% in the first five months of 1991. Much of the volume drop occurred in the bleached categories, reflecting a shift by a major consumer to bags with a significant wastepaper content. Special industrial papers also exhibited weakness, falling 2%, but production of specialty packaging papers climbed 6.4%.

Paperboard: Containerboard production for domestic use showed almost no growth from its comparable five-month 1990 level. Containerboard inventories at box plants and mills, which rose sharply in the beginning of 1991 offering strong support to production, dropped 17% through May from their February high of 3,106,600 tons. The backlog stood at 5.8 weeks of supply as of May 31, close to its year-end 1990 rate.

Production of recycled linerboard is beginning to take off, with the 5-month 1991 total twice its year-ago level. A major producer shifted capacity from semichemical corrugating medium to recycled linerboard.

The Fibre Box Association reported January - May 1991 box shipments 1.8% below their year-ago level. As an indication of the breadth of the current downturn, only the South-Central district, which accounts for 20% of total deliveries, increased its requirement. All other regions registered declines.

Production of paperboard for export is the bright spot among paperboard markets, with the total posting a 10.4% gain over its comparable 1990 level. Containerboard production for export -- linerboard plus corrugating medium -- surged 11.1%, bringing these exports to 11% of total containerboard production, from 9% in 1989; boxboard production for export rose 8.7%.

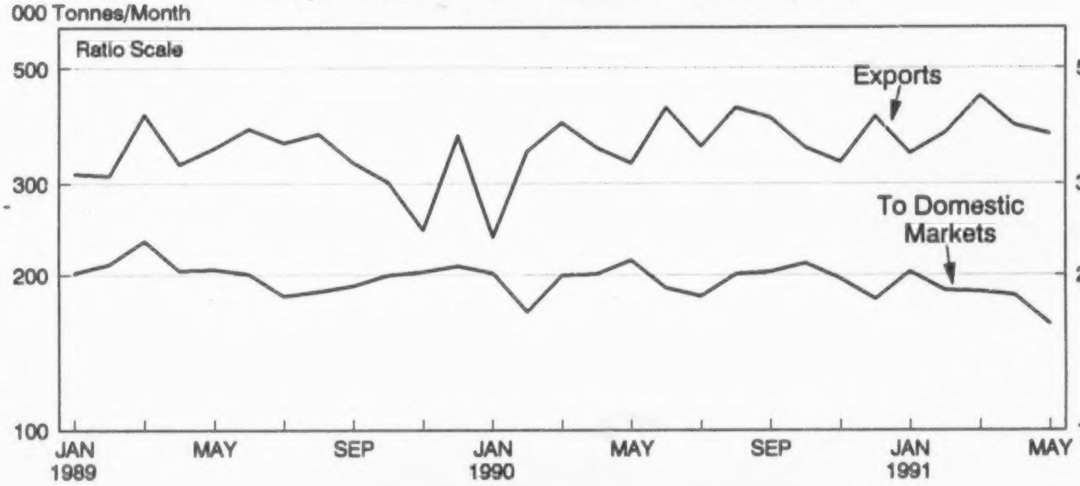
In terms of furnish, unbleached kraft paperboard production reported a 1.5% gain, bolstered by a 12.5% increase in production for export. Semichemical and recycled paperboard production was down a bit, while solid bleached kraft reported a small gain.

Boxboard production continued to run slightly below year-ago levels, with total output down 0.9%. Gains in folding boxboard and milk carton & food service for domestic use nearly offset losses in the production of non-packaging boxboard. The non-packaging grades that have been losing ground include gypsum wallboard facing -- used largely in residential construction -- and panelboard -- used mainly in automobile production.

FIBROUS RAW MATERIALS

Production of chemical paper grade market pulp during May totaled 539,000 metric tons, representing a capacity utilization rate of 85%. This was a dropoff from the previous four-month period when production averaged 586,000 metric tons and mill operating rates neared 95%. May's production matched the month's shipments, allowing producers' inventories to remain near 25 days of supply. Year-to-date shipments show a 7.5% gain over 1990's comparable level. Export shipments continue to dominate the market, accounting for two-thirds of the 1991 total. The chart below illustrates this continuing trend.

Chemical Paper Grade Market Pulp
Shipments to Domestic Markets & Exports



COMMERCIAL PRINTING MARKETS

Commercial printing, which served as an end-use market for more than one-third of domestic printing-writing paper shipments in 1990, includes a wide range of products, such as catalogs, directories, newspaper inserts, Sunday newspaper magazines, direct mail advertising materials and financial documents. Sixty to seventy percent of commercial printing output is advertising-related, which is why the current advertising slump has had a significant impact on commercial printing activity.

Output of commercial printers, as reported by the Federal Reserve Board, rose at an average annual rate of 6.3% from 1980 to 1990.

The series, however, was up a scant 0.2% relative to its year ago level during the first four months of 1991. Printers' inventories edged upward between late 1990 and April of this year, but have remained well below the peak levels of 1987 and 1988. Domestic paper shipments to commercial printers lagged their year-ago pace during the first four months of 1991, with a small gain in uncoated groundwood shipments being more than offset by declines in shipments of coated papers and uncoated free sheet.

Most of the major end-use markets served by commercial printers exhibited weakness during early 1991, although preliminary indications that the recession is winding down may bode well for advertising later in the year. Newspaper insert lineage, which increased 3.9% in 1990, was 1.1% ahead of its year-ago level during the first quarter of 1991. The strength was confined to January, with lineage figures trailing year-ago counts during February and March.

The significant mail rate hikes that took effect on February 3, 1991, are having the expected negative impact on third class mail volume, which is largely composed of direct mail advertising (flyers, circulars and catalogs) but also includes newspapers. After firming during the weeks prior to the hike, third class totals subsequently trailed their year-ago levels. For the first twenty weeks of this year, the number of third class pieces were off 1.8%.

Magazine advertising pages, which were down nearly 11% during the first four months of 1991, are yet another indication of the weak advertising environment. Commercial printers were also affected; while they don't normally print consumer magazines, they do print house organs and magazine advertising inserts.

Regional Trends: The regional distribution of commercial printing output has changed significantly over time, according to recently released Commerce Department figures. For instance, the Northeast's share of national commercial printing output declined from 41% in 1970 to 24% last year. During that same period, the West doubled its share to 18% and the South increased its share from 21% to 27%. The increased importance of the West and South in terms of printing activity reflects cost factors and regional population shifts.

REGIONAL DISTRIBUTION OF COMMERCIAL PRINTING ACTIVITY
(percent)

	1970	1990
Northeast	41%	24%
South	21	27
North Central	30	31
West	9	18

Source: U.S. Department of Commerce

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 6
JUNE, 1991

PRODUCTION (000 TONS)

	(P) MAY 1991	(R) APR 1991	MAY 1990	FIRST 5 MONTHS 1991	FIRST 5 MONTHS 1990	% CHANGE YR TO DATE 1991/1990
PAPER GRADES						
Newsprint	574	573	545	2,821	2,692	4.8
Printing & Writing	1,770	1,727	1,847	8,827	9,285	-4.9
Uncoated Groundwood (s)	130	130	140	684	724	-5.5
Coated Groundwood (s)	321	314	348	1,632	1,704	-4.3
Coated Free Sheet (s)	244	239	282	1,272	1,362	-6.6
Total Coated Paper (s)	565	553	630	2,904	3,067	-5.3
Uncoated Free Sheet Paper (s)	949	913	953	4,600	4,820	-4.6
Thin Paper (s)	18	16	18	89	109	-18.7
Cotton Fiber Paper (s)	13	13	14	66	72	-8.2
Bleached Bristols (s)	95	101	93	484	494	-2.1
Tissue Paper	472	477	494	2,399	2,386	0.6
Total Pkg & Other Paper	363	382	398	1,884	1,916	-1.7
Unbl. Kraft Paper (s)	186	207	206	983	989	-0.5
Bl. Kraft Paper (s)	33	34	42	174	205	-15.4
Specialty Pkg. Paper	46	44	46	238	224	6.4
Special Industrial Paper (s)	97	98	104	489	499	-2.0
TOTAL PAPER	3,179	3,159	3,284	15,931	16,279	-2.1
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,660	1,586	1,683	8,395	8,270	1.5
Unbleached Kraft Linerboard	1,552	1,469	1,567	7,822	7,754	0.9
Other Unbl. Kraft Paperboard	108	117	116	572	515	11.0
Semichemical Paperboard	472	463	499	2,355	2,370	-0.6
Bleached Paperboard	393	383	369	1,915	1,881	1.8
Recycled Paperboard	743	730	761	3,696	3,760	-1.7
TOTAL PAPERBOARD	3,269	3,161	3,312	16,362	16,281	0.5
TOTAL PAPER AND PAPERBOARD	6,448	6,320	6,596	32,292	32,560	-0.8

	APR 1991	MAR 1991	APR 1990	FIRST 4 MONTHS 1991	FIRST 4 MONTHS 1990	% CHANGE 1991/1990
Dissolving & Special Alpha	115	124	98	458	434	5.4
Bleached Sulfite) Unbleached Sulfite)	134	120	133	507	524	-3.3
Bleached & Semi-Bl. Sulfate	2,376	2,366	2,286	9,401	9,142	2.8
Unbleached Sulfate	1,760	1,824	1,786	7,298	7,236	0.9
Semichemical	346	338	382	1,383	1,431	-3.3
Groundwood & Thermomechanical	555	547	531	2,168	2,070	4.7
TOTAL PULP DIVISION DATA	5,285	5,319	5,215	21,215	20,837	1.8

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA June 30, 1991	1989	1990	1991	1991 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD -- Tons (000)			MARCH	APRIL	MAY		
Total Production (API)...: excluding :	76,785	76,785	6,570	6,320	6,448	77,501	-0.8
Total Seasonally Adjusted...: construction :			6,321	6,416	6,384	77,375	-0.8
Imports (Including Products)...: and wet :...E...	12,910	13,006	988	997	1,000	12,237	-7.8
Exports (Including Products)...: machine :...E...	6,263	6,787	722	683	700	8,148	19.5
Apparent Consumption...: grades :	83,432	85,004	6,587	6,730	6,684	81,463	-3.5
Paper Production % Tonnage Capacity...	93.0	93.2	88.3	88.1	85.5	88.7	-
Paperboard Production % Tonnage Capacity...	94.0	94.2	91.7	89.5	88.6	92.1	-
PAPER, PAPERBOARD AND PRODUCTS			FEBRUARY	MARCH	APRIL		
Imports...:Including Construction and :...	13,100	13,147	1,013	994	1,004	12,367	-7.8
Exports...: WMB Grades (excl. HPB) :...	6,300	6,796	644	723	685	8,106	17.7
MARKET WOOD PULP PRODUCTION - Tons (000)...	8,664	8,798	757	743	783	9,139	6.5
TOTAL WOOD PULP PRODUCTION - Tons (000)...	61,998 f	63,066 f	5,033	5,319	5,285	63,649	1.8
WOOD PULP IMPORTS - TONS (000)...	5,005	4,893	430	400	415	5,006	-0.9
WOOD PULP EXPORTS - TONS (000)...	5,766	5,905	465	600	528	6,268	7.4
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS...: excluding :...			FEBRUARY	MARCH	APRIL		
Wood Pulp...: consumption for :...	60,252	61,032	4,845	5,133	5,080	61,484	1.1
Waste Paper...: construction & :...	19,490	21,040	1,669	1,818	1,740	21,125	3.3
TOTAL...: WMB grades :...	79,742	82,072	6,513	6,951	6,820	82,609	1.6
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	96,414	99,194	8,115	8,161	8,271	100,044	0.3
EMPLOYMENT (000)			MARCH	APRIL	MAY		
Paper and Allied Products...Total...	697.4	699.3	688.7	687.1	686.8	688.9	-1.0
Pulp, Paper and Board Mills...Total...A...	245.6	245.2	241.3	240.4	240.2	241.5	-1.0
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			MARCH	APRIL	MAY		
Paper and Allied Products...	11.96	12.30	12.56	12.56	12.63	12.55	3.2
Pulp, Paper Mills...A...	14.72	15.18	15.42	15.43	15.49	15.39	2.7
Paperboard Mills...E...	14.76	15.25	15.49	15.50	15.68	15.54	3.0
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q3	1990 Q4	1991 Q1		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.72	14.02	13.07	13.07	12.60 Y	-24.6
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			MARCH	APRIL	MAY		
:IN PULP, PAPER :...Production Workers...	125.9	128.8	126.7	130.8	129.6	129.4	0.7
:AND BOARD MILLS:...All Employees...	126.5	129.3	127.5	131.4	130.3	130.3	1.1
PAPER AND ALLIED PRODUCTS (Million $)			MARCH	APRIL	MAY		
Industry Shipments (Dept. of Commerce)*...	130,501	131,080	9,994	9,949	9,941	120,763	-7.3
Pulp, Paper and Paperboard*...	57,700	56,356	4,340	4,217	4,241	52,068	-6.4
Inventories (End of Period) - Total Industry*...	12,571	12,980	13,771	13,720	13,568	13,568	6.9
Pulp, Paper and Paperboard*...	4,980	5,306	5,603	5,626	5,650	5,650	12.1
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q3	1990 Q4	1991 Q1		
Sales (Corporations Only)...	113,573	115,523	29,037	28,674	27,400	27,400	-4.8
Earnings (Corporations Only)...	7,047	4,882	1,214	614	867	867	-40.4
Depreciation (Corporations Only)...	5,010	5,578	1,389	1,481	1,441	1,441	6.3
Net Worth (Corporations Only)...	45,642	45,951	45,601	45,951	46,717	46,717	-2.6
PRICE INDEXES (Bureau of Labor Stats)1982=100			MARCH	APRIL	MAY		
Pulp, Paper & Products, ex. Building Grades...	132.4	132.9	131.9	130.7	129.9	131.5	-1.3
Wood Pulp...	157.4	151.2	126.7	125.7	122.5	128.1	-18.7
Waste Paper...	157.1	138.9	135.4	133.4	128.8	133.3	-9.7
Paper...	129.6	128.6	130.0	127.8	127.1	129.2	1.1
Paperboard...	140.1	135.7	130.2	128.3	127.0	130.0	-5.8
PAPER DEMAND (INDEXED: 1987=100)			MARCH	APRIL	MAY		
Total Paper Production *...	103.7	106.7	100.8	104.4	103.8	103.4	-2.1
Paper New Supply *...	102.4	104.6	96.4	99.1	98.7	99.5	-4.9
Demand Indicators - (Weighted Average) *...	107.8	110.1	108.6	108.4	108.5	108.8	-1.2
Production of Nondurable Goods...*...(21.2%)...	106.4	107.8	105.4	105.5	105.7	105.9	-1.6
Disposable Income...*...(23.9%)...	107.2	108.1	107.2	107.0	107.4	107.0	1.5
Total Printing and Publishing...*...(54.9%)...	108.6	111.9	110.5	110.1	110.0	110.7	-1.0
PAPERBOARD DEMAND (INDEXED: 1987=100)			MARCH	APRIL	MAY		
Total Paperboard Production *...	103.0	105.4	103.2	102.6	102.2	104.6	0.5
Production for Domestic Use ...	103.2	104.6	99.5	100.6	100.2	102.4	-0.5
Demand Indicators - (Weighted Average) *...	107.2	107.9	104.6	105.1	105.8	105.2	-2.1
Production of Consumer Goods...*...(62.06%)...	106.6	107.3	104.9	105.5	106.3	105.4	-1.5
Production of Equipment...*...(5.75%)...	112.3	115.5	112.5	112.6	112.0	112.7	-1.3
Production of Materials...*...(32.19%)...	107.4	107.8	102.6	103.0	103.6	103.6	-3.3
MARKET DATA			FEBRUARY	MARCH	APRIL		
Consumption by Publishers - Tons (000)...	13,493	13,368	941	1,064	1,025	12,110	-8.3
Newspaper Pub. and Printing Empl. Total(000)...	472	476	467	465	463	466	-1.7
Magazine Advertising Pages (PIB, Inc.)	181,995	174,706	12,840	13,326	15,037	152,071	-11.9
Wholesalers Sales and Inventories (Million $)			FEBRUARY	MARCH	APRIL		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales...	50,015	51,454	3,807	3,948	4,074	48,744	-2.8
Inventories (End of Period)...	4,132	4,300	4,167	4,061	3,944	3,944	-3.4
FIBRE BOX DATA (Fibre Box Association)			MARCH	APRIL	MAY		
Fibre Box Shipments (Million square feet)...	313,400	318,102	24,520	28,033	26,967	314,633	-1.8
Container'bd Inventory at Mill & Plant (000 Tons)...	2,589	2,765	3,002	2,880	2,574	2,574	1.2
RETAIL TRADE (Billion $)							
Total Retail Sales *...	1,742	1,808	151.5	150.9	152.5	1,809	0.6
Nondurable Goods Stores Sales *...	1,089	1,153	97.7	97.2	98.0	1,171	3.3
GENERAL ECONOMIC DATA			MARCH	APRIL	MAY		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*...	108.1	109.2	105.0	105.3	105.8	105.7	-2.7
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)...	112.2	116.3	116.1	116.0	116.5	117.0	2.2
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)...	124.0	130.7	135.0	135.2	135.6	136.0	5.1
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q3	1990 Q4	1991 Q1		
G.N.P. or Expenditure - Current $...	5,201	5,465	5,515	5,527	5,558	5,558	3.4
G.N.P. or Expenditure - 1982 $...	4,118	4,157	4,170	4,153	4,124	4,124	-0.6
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	671	681				648	

f - Wood Pulp Prod exc del., explo & scr. R - Revised E - Last month estimated by API A - Est. by API Y - 1st quarter est. by Dept. of Commerce * Seasonally Adjusted

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.7 JULY 1991

PAPER AND PAPERBOARD PRODUCTION: TURNAROUND

Paper and paperboard production trended upward during the second quarter of 1991; early data for July suggest the trend is continuing.

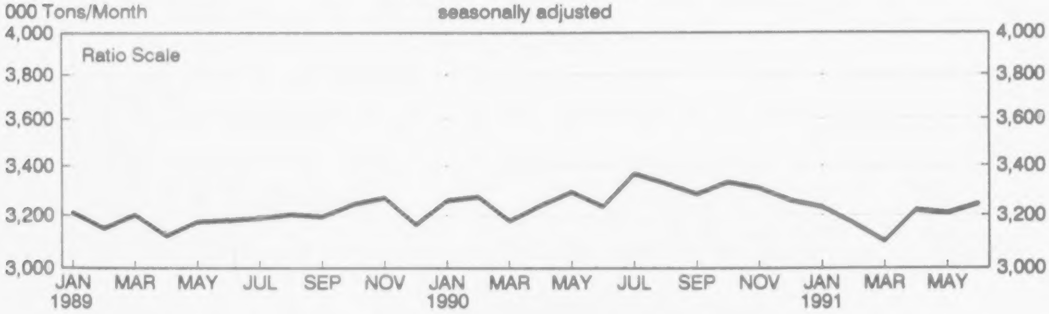
The numbers are encouraging: the June 1991 seasonally adjusted rate was 78.6 million tons per year, 3.6% above the March 1991 low and within an eyelash of the rate for all of 1990.

Most of the gain occurred in the paper grades, where the recession made its strongest impact. The seasonally-adjusted rate of total paper production rose 4.6% from March to June 1991, but the year-to-date total was still 1.6% below its corresponding 1990 level.

Paperboard production trended downward throughout the first five months of 1991, but still remained above year-ago levels. The rate turned sharply upward in June, with the seasonally-adjusted total 3.5% above May.

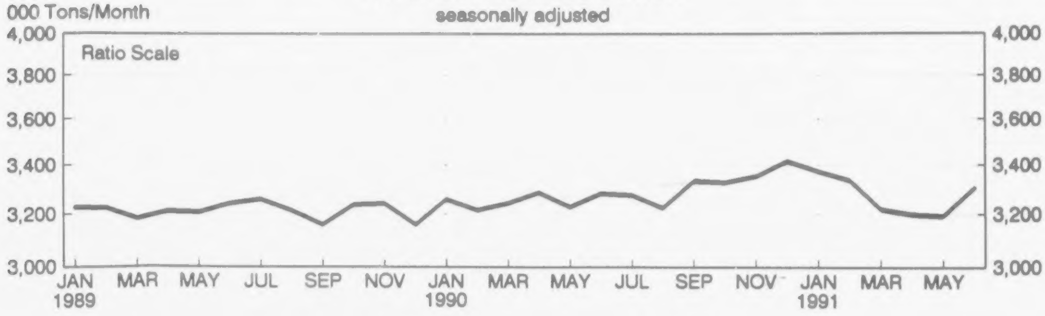
PAPER PRODUCTION

seasonally adjusted



PAPERBOARD PRODUCTION

seasonally adjusted



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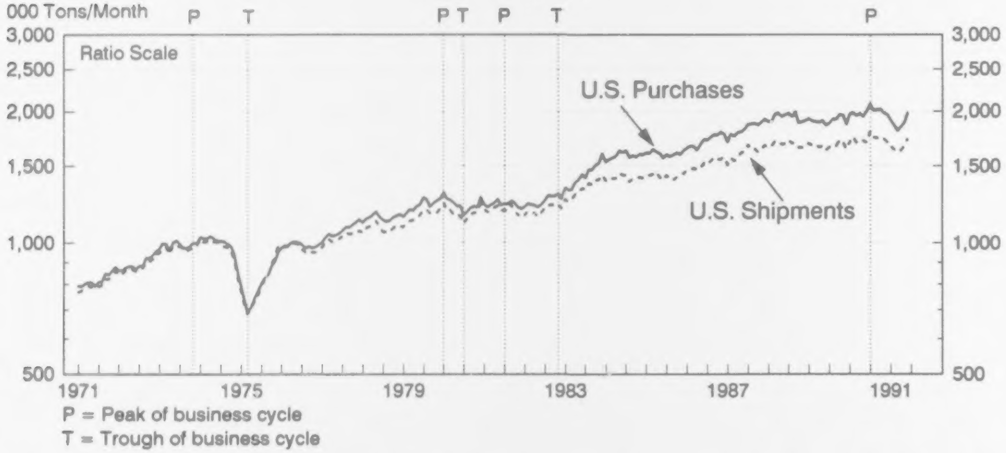
Paper: Most of the strength in paper output can be traced to increases in the demand for printing-writing papers. The seasonally-adjusted rate of total shipments of the three major grades -- coated papers, uncoated free sheet and uncoated groundwood -- bottomed out in March and then advanced 7.1% in the April-June period.

As can be seen from the following graph, the initial stages of the emerging upturn have been fairly sharp, which is reminiscent of 1975, when the end of inventory liquidation played a major role in bolstering printing-writing paper demand. Despite the recent firming trend, year-to-date shipments of the three major printing-writing grades through June 1991 were off 3.8% relative from the first half of last year; U.S. purchases (domestic shipments plus imports less exports) were down an estimated 5.1%.

Printing/Writing Papers
(unc. groundwood, free sheet, coated papers)
seasonally adjusted



Coated paper shipments trailed last year's first-half rate by 4.6% during the first six months of 1991. The seasonally-adjusted two-month moving-average, however, rose 2.1% in June after holding stable in May.

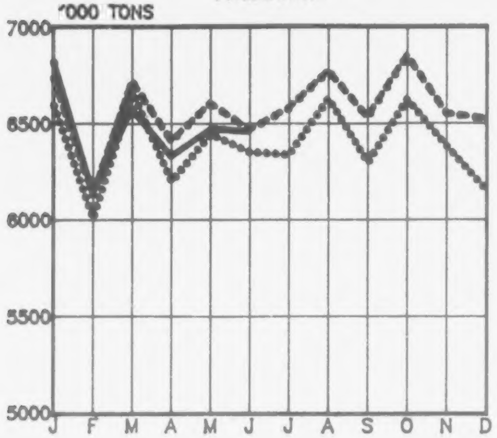
Coated paper demand was impacted by a sharp drop in print-based advertising during the first half of this year: recent signs that the economy is beginning to pull out of the recession suggest an improved advertising climate. Magazine advertising pages, which began to lose ground during early 1990, slumped 12.8% from the first half of 1990 to the first half of 1991, reflecting, in part, reduced ad spending by the tobacco and liquor industries. Third class mail volume, which is largely comprised of advertising-related materials, was 8.1% below its year-ago level during the March-May period 1991 mail period; the postage rates hikes that took effect in February appear to have triggered the decline.

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		MARCH	APRIL	MAY (R)	JUNE (P)	Annual Rate Y-T-D	% Change From Same Period
	1989	1990	1991	1991	1991	1991	1991	Last Year
PAPER								
Newsprint – Production	6,088	6,610	576	573	574	559	6,760	4.6
– Shipments	6,079	6,621	563	553	574	548	6,663	2.8
Printing & Writing: Total Shipments	21,626	22,336	1,774	1,736	1,789	1,772	21,260	-3.9
Groundwood Paper – Shipments	1,743	1,764	148	135	137	142	1,685	-2.7
– New Orders	1,741	1,831	154	127	142	189	1,825	3.6
– Unshipped Orders	193	172	239	233	244	280	280	62.7
Coated Groundwood – Shipments	4,059	4,233	331	315	322	343	3,952	-3.5
Coated Free Sheet – Shipments	3,157	3,303	257	244	250	251	3,069	-5.9
Total Coated Papers – Shipments	7,215	7,536	588	558	572	594	7,022	-4.6
– New Orders	7,171	7,438	600	582	601	614	7,069	-4.7
– Unshipped Orders	706	720	528	565	604	592	592	-17.8
Unctd Free Sheet – Shipments	11,081	11,475	901	912	954	919	11,042	-3.5
– New Orders	11,097	11,465	856	922	999	1,001	10,941	-6.9
– Unshipped Orders	748	871	476	509	552	601	601	-31.0
Thin Papers – Shipments	262	234	18	16	18	15	207	-17.4
Cotton Fiber Paper – Shipments	161	161	14	13	13	12	156	-8.7
Bleached Bristols – Shipments	1,164	1,166	105	101	95	90	1,148	-2.0
Tissue Paper – Production	5,636	5,802	505	477	472	474	5,746	0.3
Total Packaging & Other Paper	4,916	4,576	387	380	357	367	4,473	-2.1
Unbl. Kraft Paper – Shipments	2,681	2,377	203	207	185	195	2,353	-1.7
Bl. Kraft Paper – Shipments	468	484	36	34	33	31	409	-15.6
Specialty Pkg. Paper – Production	520	563	52	47	46	47	588	9.4
Special Industrial Paper – Shipments #	1,248	1,153	97	93	92	94	1,123	-2.5
TOTAL PAPER PRODUCTION – UNADJUSTED #	38,266	39,325	3,243	3,166	3,192	3,172	38,238	-1.7
TOTAL PAPER PRODUCTION – SEAS ADJ			3,100	3,221	3,208	3,243	38,354	-1.6
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,388	2,279	2,162	2,269	2,258	27,142	1.0
Cont'bd For Dom Use for Fibre Boxes	23,752	24,432	1,968	1,886	2,015	1,954	23,775	-0.4
Total Linerboard	16,399	16,875	1,349	1,280	1,389	1,330	16,316	-0.2
Unbleached Kraft	15,833	16,414	1,286	1,212	1,318	1,263	15,588	-2.2
Solid Bleached	178	139	12	12	12	12	143	4.4
Recycled	388	323	50	56	59	55	585	104.0
Corrugating Medium	7,339	7,549	618	603	624	621	7,438	-1.0
Semichemical	5,554	5,567	454	447	456	452	5,465	-0.9
Recycled	1,785	1,982	164	155	167	169	1,972	-1.1
Container Chip and Filler	14	7	2	2	2	3	21	135.6
Other Containerboard for Dom Use	307	282	26	25	22	31	293	1.1
Containerboard for Export	2,369	2,674	285	252	232	272	3,074	12.8
Boxboard	12,092	12,035	1,047	996	1,004	1,025	12,149	-0.8
Boxboard for Packaging for Dom Use	7,076	6,949	636	613	600	626	7,376	5.0
Folding Boxboard	5,370	5,198	482	466	455	478	5,595	7.5
Solid Bleached	1,980	1,818	162	166	166	164	1,943	3.8
Unbleached Kraft	987	970	93	93	87	102	1,119	19.4
Recycled	2,403	2,410	227	208	202	212	2,534	5.8
Set-up Boxboard for Dom Use	288	290	23	21	23	25	273	-13.6
Milk Carton & Food Service Dom Use	1,419	1,461	131	125	123	124	1,508	0.3
Other Boxboard for Domestic Use	4,152	4,145	318	295	308	316	3,713	-12.4
Boxboard for Export	863	941	94	89	97	83	1,060	8.1
Paperboard Production by Furnish	38,519	39,423	3,326	3,158	3,273	3,282	39,291	0.4
Unbleached Kraft	19,490	20,357	1,701	1,586	1,664	1,672	20,140	1.2
Semichemical	5,691	5,710	469	463	472	467	5,644	-0.5
Solid Bleached Kraft	4,521	4,399	390	383	393	381	4,592	1.6
Recycled	8,817	8,956	767	727	744	763	8,914	-1.3
Paperboard Production for Export	3,232	3,615	379	341	328	354	4,134	11.6
Unbleached Kraft	2,363	2,691	296	257	238	275	3,141	14.5
Semichemical	138	142	15	15	16	14	179	12.7
Bleached Kraft	693	732	63	66	71	58	757	0.1
Recycled	38	49	5	4	4	7	57	24.1
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,519	39,423	3,326	3,158	3,273	3,282	39,291	0.4
TOTAL PAPERBOARD PROD – SEAS ADJ			3,220	3,200	3,193	3,305	39,259	0.6
PAPER AND PAPERBOARD – UNADJ #	76,785	78,748	6,569	6,324	6,465	6,454	77,529	-0.6
PAPER AND PAPERBOARD – SEAS ADJ			6,321	6,421	6,401	6,549	77,613	-0.5

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted # – 1990, 1991 Series Revised

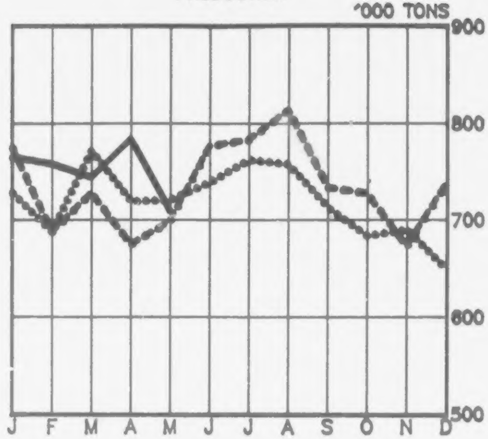
TOTAL PAPER AND PAPERBOARD

PRODUCTION



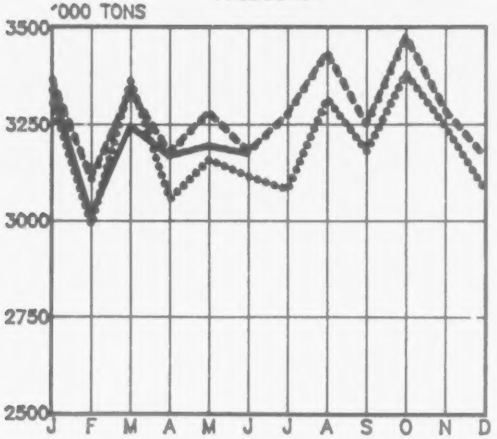
MARKET WOOD PULP

PRODUCTION



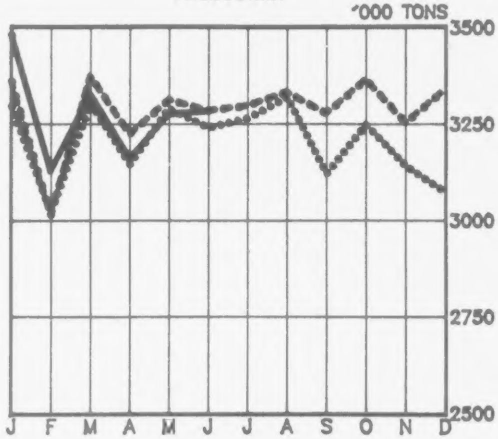
TOTAL PAPER

PRODUCTION



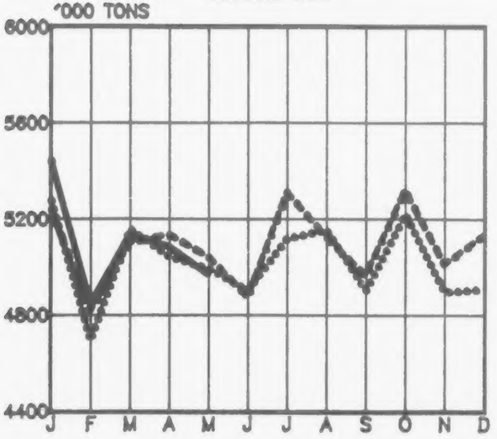
TOTAL PAPERBOARD

PRODUCTION



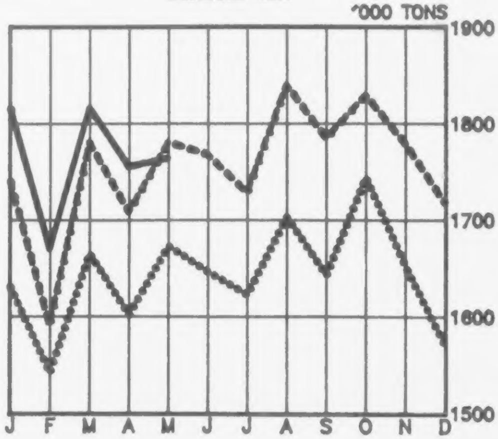
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 •••••••• 1990 ▬ ▬ ▬ 1991 ━━━━

WOOD PULP STATISTICS (Thousands of Tons)		YEAR		FEB	MAR	APR (R)	MAY (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
		1989	1990	1991	1991	1991	1991	1991	
TOTAL WOOD PULP									
Total Wood Pulp	Production	61,998	63,068	5,033	5,319	5,285	5,162	63,307	1.6
	Imports A	5,005	4,893	430	400	415	382	4,922	-2.9
	Exports #	5,766	5,905	485	600	528	576	6,396	11.5
	New Supply	61,237	62,056	4,978	5,119	5,172	4,968	61,833	0.3
Dissolving Pulp	Production	1,425	1,293	104	124	115	92	1,321	2.5
	Imports	284	222	18	7	18	16	165	-32.9
	Exports #	798	782	64	70	50	71	738	-2.6
	New Supply	912	733	58	61	83	37	748	-3.8
Paper Grades Chemical Pulp	Production	50,181	51,192	4,098	4,310	4,270	4,206	51,393	1.8
	Imports A	4,370	4,326	386	363	370	330	4,407	-0.9
	Exports #	4,913	5,080	418	524	475	498	5,613	14.0
	New Supply	49,639	50,438	4,065	4,149	4,164	4,039	50,188	0.3
Groundwood and Thermo-Mech	Production	6,029	6,363	503	547	555	528	6,470	4.4
	Imports A	351	345	26	31	27	35	349	-7.2
	Exports #	55	44	3	6	3	6	45	-13.3
	New Supply	6,324	6,665	526	571	579	558	6,774	3.9
Semi-Chemical	Production	4,363	4,219	329	338	346	335	4,123	-4.4
	Imports								
	Exports								
	New Supply	4,363	4,219	329	338	346	335	4,123	-4.4
MARKET WOOD PULP									
Total Market Wood Pulp	Production	8,664	8,798	757	743	783	708	9,011	5.5
	Imports	3,539	3,215 C	280	223	283	235	3,064	-7.8
	Exports	5,309	5,561	476	562	479	491	5,864	14.7
	New Supply	6,893	6,451 C	560	404	587	453	6,210	-8.0
Dissolving Pulp	Production	1,422	1,292	104	123	115	92	1,317	2.3
	Imports	210	170 C	16	4	18	16	148	-17.1
	Exports	821	782	62	75	51	78	775	5.2
	New Supply	810	679 C	58	53	82	30	689	-5.4
Paper Grades Chemical Pulp	Production	7,242	7,506	653	620	669	616	7,693	6.1
	Imports	3,072	2,813	247	200	246	200	2,695	-7.4
	Exports	4,489	4,779	414	487	428	413	5,089	16.3
	New Supply	5,825	5,540	486	333	487	402	5,299	-8.4
Groundwood Pulp and All Other	Production	0	0	0	0	0	0	0	N.M.
	Imports	258	232 C	17	18	19	20	222	-5.1
	Exports	0	0	0	0	0	0	0	N.M.
	New Supply	258	232 C	17	18	19	20	222	-5.1

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce. C - Correction.

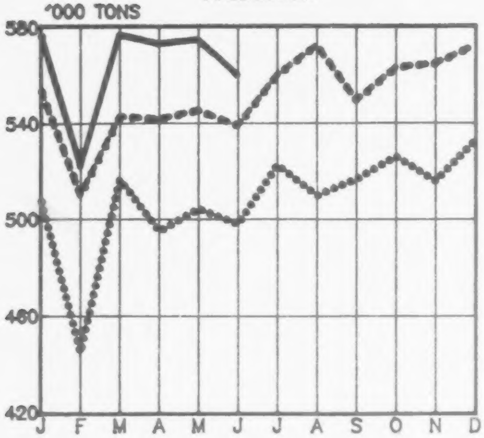
NOTE: A - API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. N.M. - Not Meaningful. # - 1989 Exports revised by API.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR		FEB	MAR	APR (R)	MAY (P)	Annual Rate	% Change From Same Period Last Year
	1989	1990	1991	1991	1991	1991	1991	
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,072	6,513	6,949	6,834	6,728	82,263	1.1
Total Wood Pulp	60,252	61,032	4,845	5,133	5,080	4,965	61,102	0.6
Waste Paper	19,490	21,040	1,669	1,816	1,754	1,763	21,161	2.6
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	216	216	198	209	209	13.9
Producers' Market Inventories	342	476	554	483	521	530	530	17.3
Consumers' Purchased Inventories #	519	392	409	406	394	389	389	-10.9
Waste Paper at Paper & Bd. Mills	1,082	909	917	907	960	1,025	1,025	1.3
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	27	23	24	25	25	13.6

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # Includes all grades of wood pulp
P - Preliminary; R - Revised; 0 - Indicates zero to five-hundred short tons

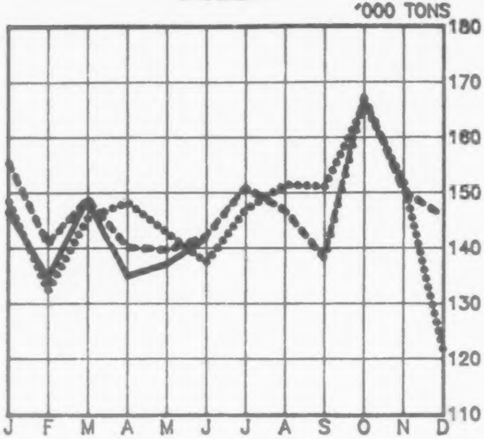
NEWSPRINT

PRODUCTION



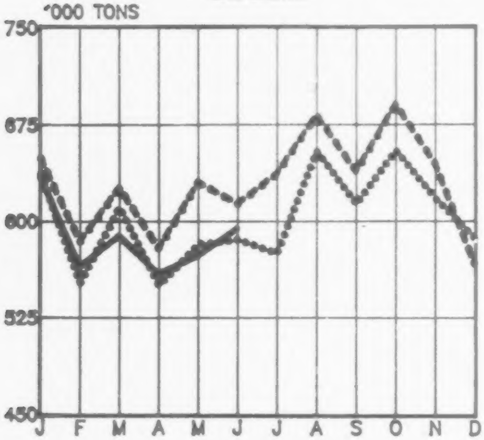
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



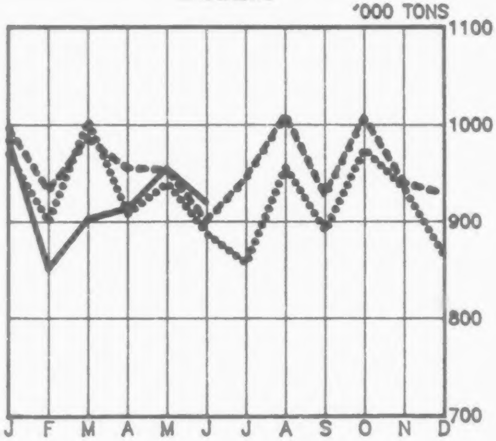
COATED PAPER

SHIPMENTS



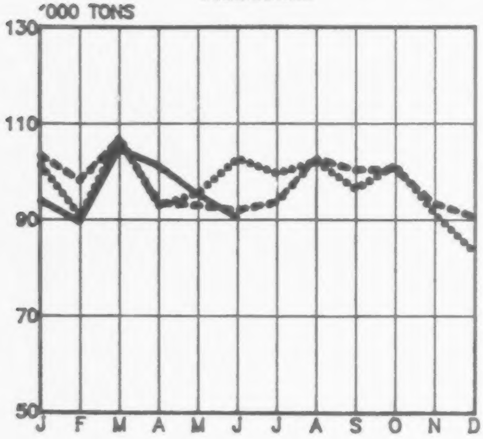
UNCOATED FREE SHEET PAPERS

SHIPMENTS



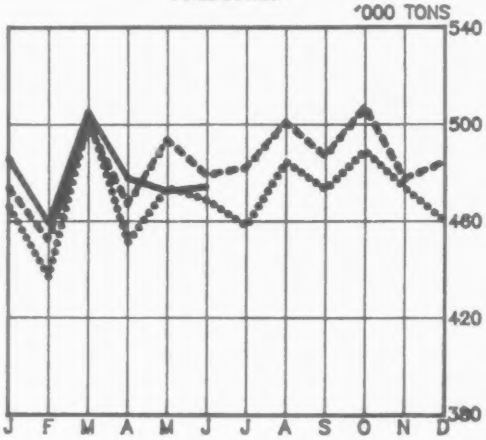
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1989 •••••••• 1990 ━ ━ ━ 1991 ━━━━

FIBROUS RAW MATERIALS Thousands of Standard (128 Cu. ft.) Cords	YEAR		FEBRUARY	MARCH	APRIL	MAY	ANNUAL RATE Y-T-D	% CHANGE FROM SAME PD LAST YEAR
	1989	1990	1991	1991	1991	1991	1991	
PULPWOOD								
Total U.S. – Total Receipts	99,279	99,304	8,171	8,161	8,097	7,934	98,741	-0.5
– Total Consumption	98,414	99,194	8,115	8,161	8,271	8,108	99,494	0.2
– Residues *	34,539	35,727	2,777	2,856	2,937	2,858	34,553	-3.6
– Inventories	5,462	5,961	5,554	5,670	5,082	4,936	4,936	-4.7
So. Atlantic – Total Receipts	31,962	32,536	2,631	2,518	2,658	2,477	31,382	-6.0
– Total Consumption	32,239	32,412	2,659	2,641	2,697	2,586	32,282	-1.1
– Residues *	9,961	11,181	854	858	876	803	10,517	-5.3
– Inventories	936	1,334	1,291	1,194	1,183	1,117	1,117	3.7
Northeast – Total Receipts	7,242	7,264	655	633	578	533	7,423	4.4
– Total Consumption	7,072	7,080	590	603	582	561	7,020	-3.2
– Residues *	1,575	1,505	140	145	139	129	1,678	12.0
– Inventories	522	449	531	523	465	396	396	-4.4
South Central – Total Receipts	35,840	37,246	2,993	3,238	3,135	3,140	38,335	6.0
– Total Consumption	35,791	36,784	3,079	3,148	3,109	3,208	38,340	5.9
– Residues *	10,539	11,516	923	993	1,019	1,021	11,962	4.1
– Inventories	1,336	1,879	1,472	1,629	1,432	1,233	1,233	5.9
North Central – Total Receipts	7,020	7,074	709	575	464	548	7,306	4.5
– Total Consumption	6,963	7,129	597	605	642	628	7,486	3.9
– Residues *	1,422	1,308	100	101	105	111	1,224	-8.4
– Inventories	938	1,014	1,144	1,203	1,029	942	942	11.0
West – Total Receipts	17,196	15,184	1,163	1,197	1,262	1,236	14,294	-6.6
– Total Consumption	16,349	15,789	1,190	1,164	1,241	1,125	14,366	-10.3
– Residues *	11,042	10,217	760	759	798	794	9,173	-12.0
– Inventories	1,730	1,285	1,116	1,121	973	1,249	1,249	-25.4

SOURCE: American Pulpwood Association

* – Consumption of Residues in cords equivalent

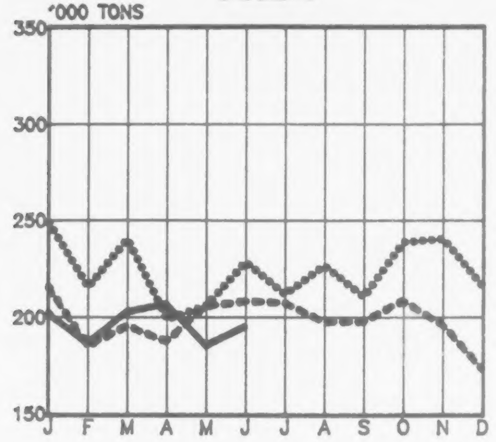
UNITED STATES TRADE WITH CANADA	IMPORTS FROM CANADA YEAR 1990		APRIL 1991		MAY 1991		ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
	Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (in cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood chips	709,197	22,413	65,814	2,131	68,692	2,409	708,414	-3.3
Wood Pulp, Total	4,322,418	2,514,301	339,295	158,833	338,073	151,260	4,270,439	-6.3
Waste Fibrous Materials, Total	130,452	31,442	13,179	2,957	12,409	2,711	135,430	-11.4
Paper, Board & Products, Total	11,191,700	6,317,590	866,184	512,496	885,667	511,666	10,634,037	-7.3
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	11,047,032	5,968,425	853,241	479,651	872,959	480,104	10,488,652	-7.3
Paper, Paperboard & Products	11,066,239	6,284,416	860,172	510,876	877,745	509,616	10,565,472	-7.0
Paper & Paperboard, Only	10,921,571	5,935,250	847,229	478,029	865,038	478,052	10,420,086	-7.0
Paper, Total	10,385,505	5,723,101	803,963	460,376	821,236	459,969	9,891,807	-7.7
Newsprint	8,118,161	4,162,493	621,310	335,902	648,248	346,037	7,739,564	-9.0
Printing, Writing & Rel. Pap.	1,914,083	1,295,073	156,697	105,239	147,012	93,639	1,844,711	-1.1
Pack. & Ind. Conv. Paper	211,903	121,069	16,434	10,276	17,683	10,866	207,577	-1.3
Special Industrial Paper	57,441	68,444	3,240	4,994	3,463	5,206	41,340	-34.2
Tissue Paper	83,917	76,023	4,282	3,964	4,831	4,241	58,615	-16.2
Paperboard, Total	536,067	212,149	43,266	17,653	43,803	18,064	528,279	7.7
Convtd Paper&Paperbd Products	144,668	349,166	12,943	32,848	12,708	31,564	145,386	-5.8
Wet Machine Board	884	757	54	48	48	44	710	-27.8
Construction Paper & Board	124,576	32,418	5,959	1,574	7,872	2,006	67,856	-36.9

EXPORTS TO CANADA								
Pulpwood, Roundwood (in cubic meters)	1,036,727	36,801	59,246	1,636	82,340	2,343	1,919,762	434.6
Pulpwood chips	193,841	9,066	26,097	1,207	23,374	1,116	246,706	37.2
Wood Pulp, Total	326,456	165,508	23,530	10,748	19,265	9,362	260,793	-25.6
Cotton Pulp & Other Pulp	4,373	4,264	374	370	275	266	4,739	11.9
Waste Paper	653,204	116,346	53,373	10,224	48,852	9,001	586,118	-3.6
Paper, Board & Products, Total	1,194,633	1,317,384	122,685	136,306	118,632	127,100	1,370,454	16.6
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	92,236	85,352	88,853	80,226	1,033,386	16.3
Paper, Paperboard & Products	1,192,443	1,315,696	122,234	136,065	117,231	126,263	1,364,976	16.3
Paper & Paperboard, Only	890,912	818,590	91,786	85,111	87,452	79,389	1,027,907	15.9
Paper, Total	521,586	595,952	59,625	65,998	52,557	58,261	643,711	23.6
Newsprint	20,813	11,389	2,715	1,656	4,169	2,496	29,894	50.2
Printing, Writing & Rel. Pap.	372,852	424,207	41,512	45,620	36,896	41,320	453,462	19.7
Pack. & Ind. Conv. Paper	52,367	36,780	5,746	4,138	5,187	3,794	62,973	29.7
Special Industrial Paper	59,301	106,279	5,754	10,558	4,261	8,271	60,857	0.6
Tissue Paper	16,253	17,297	3,898	4,027	2,026	2,382	36,525	178.5
Paperboard, Total	369,326	222,638	32,160	19,113	34,896	21,127	384,196	4.9
Convtd Paper&Paperbd Products	301,531	497,106	30,448	50,954	29,780	46,874	337,069	17.5
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,689	451	241	1,401	837	5,478	194.4

SOURCE: Bureau of Census, Department of Commerce .

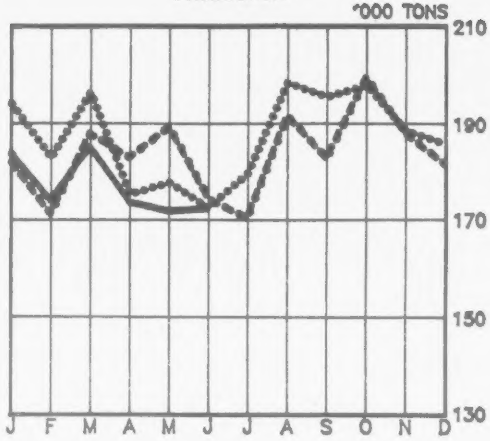
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



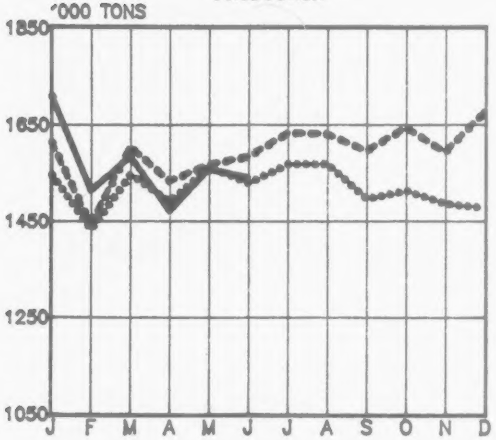
OTHER PAPER

PRODUCTION



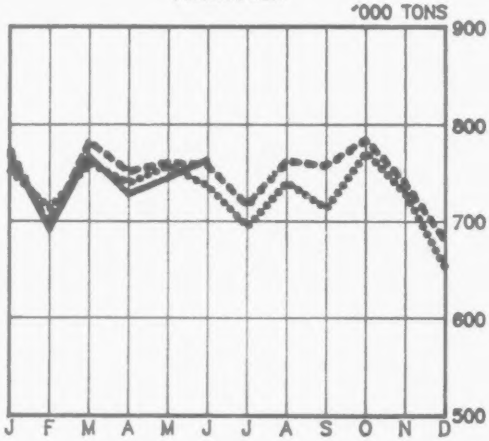
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



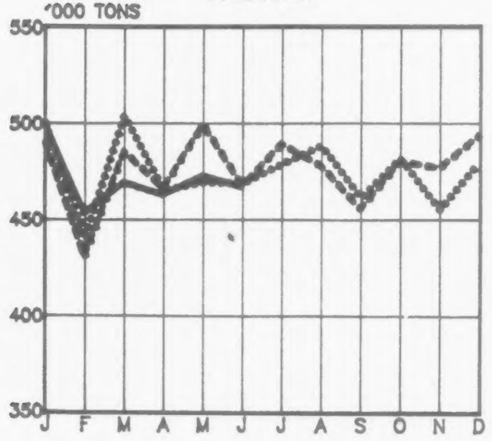
RECYCLED PAPERBOARD

PRODUCTION



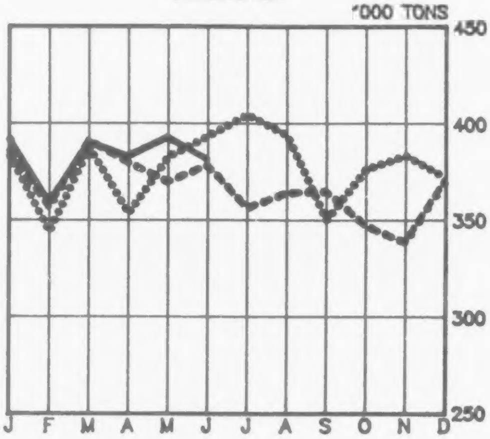
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1989 ••••••••• 1990 ▬ ▬ ▬ 1991 ━━━━

PULP, PAPER AND PAPERBOARD IMPORTS	YEAR 1990		APRIL 1991		MAY 1991		Annual Rate YTD 1991	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood Roundwood (cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood Chips	710,415	22,560	65,814	2,131	68,692	2,409	709,079	-3.3
Total All Imports	18,177,409	11,292,256	1,433,169	857,088	1,412,343	839,896	17,402,786	-6.5
Wood Pulp Total	4,893,355	2,831,327	415,359	191,298	382,061	171,492	4,821,549	-2.9
Waste Paper	122,539	26,349	13,115	2,821	12,317	2,623	138,189	-2.6
Other Fibrous Materials	14,037	9,286	732	431	799	665	8,183	-43.8
Paper Board & Products Total	13,147,479	8,425,293	1,003,963	682,538	1,017,168	685,115	12,334,878	-7.9
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	12,728,760	7,425,583	971,863	583,158	985,546	582,884	11,941,146	-7.9
Paper Ppbd & Prds ex Cnst&WMB	13,006,238	8,382,641	997,267	680,491	1,008,124	682,175	12,256,369	-7.6
Paper & Paperboard Only	12,587,519	7,382,931	965,286	581,110	976,504	579,944	11,862,629	-7.6
Paper Total	11,961,306	7,077,036	916,300	557,891	926,891	555,768	11,258,911	-8.1
Newsprint	8,299,557	4,247,131	639,158	343,467	654,716	349,042	7,875,187	-9.7
Printing & Writing	3,104,863	2,248,424	238,286	170,015	238,011	164,387	2,911,200	-2.9
Uncoated Groundwood	1,337,581	843,560	117,188	75,254	105,606	85,811	1,347,136	3.1
Coated Print.& Impreg. Pap.	938,048	749,082	69,021	55,554	78,684	60,354	855,814	-7.5
Uncoated Free Sheet	752,448	664,479	44,631	30,473	44,757	30,071	618,638	-10.5
Thin (except Cigarette)	11,365	14,296	1,513	1,752	1,358	1,679	15,535	36.0
Bristols	67,424	77,017	5,933	8,982	5,828	6,471	74,077	18.3
Total Pkg & Other Paper	425,697	462,237	33,304	39,341	30,777	37,569	388,282	-9.3
Unbleached Kraft Paper	235,352	116,655	18,346	9,216	16,789	8,748	222,835	-1.9
Other Pkg. & Indust. Paper	190,345	345,582	14,958	30,125	13,987	28,821	165,447	-17.7
Tissue	131,189	119,244	5,553	5,067	5,388	4,769	84,243	-23.9
Paperboard, Total	626,213	305,895	48,986	23,220	49,613	24,176	603,717	3.4
Test or Containerboard	113,629	48,929	6,523	2,715	9,080	3,786	90,507	-30.4
Semi-Chemical Corrugating	111,935	31,152	4,376	1,148	5,561	1,368	66,822	-41.1
Other Paperboard	400,649	227,180	38,088	19,356	34,972	19,023	446,389	31.1
Convtd Paper&Paperbd Products	418,719	999,710	31,980	79,380	31,620	82,232	393,730	-6.1
Paper Products, Total	313,106	807,967	22,997	63,008	23,363	67,069	296,021	-9.4
Paperboard Products, Total	105,613	191,744	8,983	16,372	8,257	15,162	97,709	-4.0
Wet machine Board	1,132	991	91	86	57	56	926	-26.3
Construction Paper & Board E	140,110	41,661	6,606	1,982	8,985	2,884	77,592	-37.5
Notes								
Other: No Weight Avail. ($000)		136,809		9,673		10,927	113,012	-2.1
Total Imports Incl. Other($000)		11,429,064		866,759		850,823	10,607,662	-6.8

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		APRIL 1991		MAY 1991		Annual Rate YTD 1991	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood, Roundwood (cubic meters)	1,122,468	39,971	61,425	1,819	84,153	2,429	1,950,382	325.2
Pulpwood Chips	4,637,669	412,018	398,386	37,257	461,039	41,632	5,144,812	24.2
Total All Exports	19,352,011	9,075,342	1,842,396	844,491	1,878,931	853,882	21,556,960	13.2
Wood Pulp, Total	5,905,339	3,156,671	528,095	246,217	575,527	266,710	6,395,908	11.5
Cotton Pulp and Other Pulp	135,632	104,808	8,094	7,204	11,288	8,242	110,104	11.4
Waste and Old Paper	6,514,652	779,687	621,164	70,427	682,317	72,586	6,896,554	7.7
Paper, Board & Products, Total	6,796,388	5,035,177	685,042	520,643	699,801	506,344	8,164,683	19.6
Paper, Paperboard, Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	572,647	347,066	591,826	343,806	6,892,417	19.0
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,683	683,374	519,720	697,780	504,812	8,142,766	19.5
Paper & Paperboard, Only	5,738,750	3,443,249	570,979	346,172	589,806	342,275	6,870,602	18.9
Paper, Total	1,519,052	1,455,104	176,700	159,668	168,875	147,961	1,888,435	23.4
Newsprint	535,993	293,182	59,830	32,165	54,246	28,071	619,779	14.5
Printing & Writing	664,824	717,700	75,762	77,790	84,284	79,658	878,753	28.9
Uncoated Groundwood	75,299	63,574	11,769	9,181	12,179	8,256	117,253	57.8
Clay Coated Paper	218,684	215,289	19,972	19,191	24,821	22,466	253,329	18.3
Uncoated Free Sheet	232,369	306,127	30,313	36,049	30,688	34,836	340,348	42.1
Other Printing & Writing	138,472	132,709	13,706	13,369	16,596	14,100	167,822	9.1
Total Pkg. & Other Paper	283,584	403,949	34,260	42,979	25,921	35,122	329,642	20.6
Unbleached Kraft	112,828	60,480	14,573	7,605	10,774	5,792	134,007	21.5
Other Pkg. & Indust. Paper	170,756	343,469	19,687	35,374	15,147	29,330	195,636	20.0
Tissue	34,651	40,273	6,849	6,734	4,423	5,111	60,260	79.3
Paperboard, Total	4,219,698	1,988,144	394,279	186,504	420,931	194,313	4,982,067	17.2
Solid Wood Pulp	3,993,101	1,867,502	376,778	176,744	403,314	183,599	4,760,900	18.6
Total Linerboard	2,924,140	1,076,705	261,902	95,929	288,063	102,576	3,452,929	17.7
Bleached Kraft Linerboard	335,444	150,819	25,710	14,156	27,968	12,371	387,657	27.9
Unbleached Kraft Linerbd	2,588,697	925,886	236,192	81,773	260,095	90,205	3,065,272	16.5
Other Unbleached Kraft	253,945	144,169	37,287	21,058	33,209	17,788	400,283	44.4
Other Bleached Kraft	764,550	628,859	69,345	57,004	74,239	60,904	834,187	8.7
Semi-Chemical Corrugating	50,466	17,769	8,245	2,753	7,803	2,433	73,501	102.9
Recycled Paperboard	226,598	120,643	17,501	9,760	17,617	10,714	221,167	-6.4
Convtd Paper&Paperbd Products	1,047,768	1,585,435	112,395	173,547	107,974	162,538	1,272,288	22.8
Paper Products, Total	440,793	1,012,642	51,630	116,835	49,991	110,027	566,984	36.4
Paperboard Products, Total	606,975	572,793	60,766	56,712	57,983	52,510	705,282	13.8
Wet Machine Board	487	232	46	27	13	5	321	-66.1
Construction Paper & Board E	9,384	6,262	1,622	897	2,007	1,527	21,886	162.2
Notes								
Other: No Weight Avail. ($000)		49,964		5,630		5,915	59,023	36.5
Total Exports Incl. Other($000)		9,125,306		850,121		859,797	9,939,624	8.2

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		MAR	APR	MAY	JUNE	Annual Rate Y-T-D	% Change from same Period
	1989	1990	1991	1991	1991	1991	1991	Last Year
Pulp, Paper and Products except Building Grades	132.4	132.9	131.9	130.7	129.9	129.0	131.1	-1.6
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	131.8	130.7	129.9	129.1	131.1	-1.4
Total Wood Pulp	157.4	151.2	126.7	125.7	122.5	118.1	126.1	-19.5
Total Paper	129.6	128.8	130.0	127.8	127.1	125.9	128.6	0.5
Writing Paper, exc. Newsprint	130.5	129.1	128.8	126.2	124.8	125.9	127.7	-0.5
Newsprint	122.5	119.6	126.9	121.3	122.1	119.7	124.0	6.1
Total Paperboard	140.1	135.7	130.2	128.3	127.0	126.7	129.5	-6.0
Total Paper and Paperboard *	132.9	131.0	130.1	128.0	127.1	126.2	128.9	-1.6
Converted Products	131.7	135.1	136.2	135.6	135.2	134.9	135.7	0.6
Waste Paper	157.1	138.9	135.4	133.4	128.8	121.0	130.9	-10.1
All Commodities	112.2	116.3	116.1	116.0	116.5	116.3	116.9	2.1
Industrial Commodities	111.6	115.8	115.6	115.5	116.1	116.0	116.6	2.8

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

Paper and Allied Products Companies
Sales and Earnings

	Sales			Net Profit After Taxes			Net Profits/Sales	
	1991	1990	91/90	1991	1990	91/90	1991	1990
	Thousand Dollars		% Change	Thousand Dollars		% Change	%	%
	26 Paper and Allied Products Companies							
First Quarter	16,924,019	17,641,444	-4.1	586,248	1,037,627	-43.5	3.46	5.88
Second Quarter	17,070,767	17,841,822	-4.3	535,541	990,113	-45.9	3.14	5.55
Third Quarter		17,804,691			758,789			4.26
Fourth Quarter		17,867,126			408,830			2.29
Year-to-date	33,994,786	35,483,266	-4.2	1,121,789	2,027,740	-44.7	3.30	5.71
Full Year		71,155,083			3,195,359			4.49

The seasonally adjusted two-month moving-average of uncoated free sheet paper shipments rose 4.9% in May and then edged up 0.5% in June. Year-to-date shipments of uncoated free sheet paper through June, however, were down 4.6%. The moving-average for uncoated groundwood paper shipments reached a low point in May for the first half of this year, but moved 3.6% higher in June.

The weakness in end-use markets for printing-writing papers evident so far this year has not led to a significant buildup in market-channel inventories. Printers' inventories, for example, remained approximately stable through April of 1991 and dropped fairly sharply in May.

Weak advertising markets have also taken a heavy toll on newsprint demand. Consumption of newsprint by daily newspapers, which accounts for approximately three quarters of total domestic demand, trailed its year-ago volume by 8.4% during the first half of 1991. Consumption in all end uses, which includes daily newspapers, weekly newspapers, inserts, flyers, and direct mail advertising, was off by 8.6%.

Newsprint shipments to the U.S. from all North American mills were 7.1% below their year-ago total during the first six months of 1991. Reduced imports from Canada accounted for the entire decline; shipments from U.S. mills to the domestic market increased 2.0% and, according to API's Newsprint Division, exports expanded by an impressive 39.7%, accounting for 9.0% of domestic production. Total U.S. newsprint shipments posted a 2.8% gain during the first half of 1991.

Newsprint inventories rose sharply during the first half of this year. Stocks held at Canadian and U.S. mills reached 706,000 short tons in June, up 77% from the December 1990 level. U.S. publishers had a 52 day supply of newsprint at the end of June, up from 43 days at the end of 1990.

Shipments of unbleached kraft papers lagged their year-ago volume by 20,000 tons (1.7%) during the first six months of 1991, extending the downtrend that has been evident since the early 1980's, when these grades first began facing stiff competition from plastics.

Total demand for unbleached packaging papers appears to have been stronger than the shipments data alone suggest. API's Kraft and Packaging Papers Division estimates that consumption of recycled-content papers to produce bags and sacks totaled 90,000 tons during the first six months of 1991, up 24,000 tons (36.4%) from the first half of last year. When imports and exports are factored in, new supply of unbleached kraft papers edged 0.8% above its year ago level during the first half of 1991.

Shipments of bleached kraft papers weakened 15.6% between the first half of 1990 and the first half of 1991. The sharp decline appears to have resulted from a shift to unbleached and recycled-content packaging grades.

Paperboard: Containerboard production for domestic use in fibre boxes trailed its year-ago volume by 2.5% in the second quarter of 1991, after exceeding its year-ago pace by 1.7% during the first three months of 1991. Year-to-date production through June was off 0.4%.

Although containerboard inventories at mills and box plants expanded 52,000 tons in June, they remain relatively lean at 5.4 weeks of supply (2.63 million tons). These inventories had increased during the final two months of 1990 and continued to build during January - February of this year as mills attempted to sustain production. Roll stocks subsequently declined by 520,000 tons in the March - May period, erasing most of the previous buildup.

End-use market activity for boxes now appears to be picking up. Manufacturing output registered its third consecutive gain in June according to the Federal Reserve Board, although still 3.3% below its June 1990 level.

Fibre box shipments declined 2.0% relative to one year ago during the first six months of 1991. The latter period included one less shipping day; adjusted for shipping days, box shipments trailed their year-ago pace by 1.2% during the first half of 1991, with the first quarter total down 0.6% and the second quarter off 1.9%.

Exports remain a bright spot in the containerboard demand picture. After surging 12.9% in 1990, containerboard production for export exceeded its year-ago rate by 12.8% during the first six months of 1991.

Total folding boxboard production for domestic use exceeded its year-ago volume by 7.5% during the first half of 1991, following a 3.2% setback from 1989 to 1990. Unbleached kraft folding boxboard for domestic use surpassed its year-ago volume by 19.4% during the first half of 1991 while exports rose by 36.4%. The strong gain was made possible by the start-up of a new machine in mid-1990.

The domestic component of solid bleached folding boxboard production was up 3.8% during the first half of 1991, but, at an annual rate of 1.94 million tons, was still below full-year 1989 output of 1.98 million tons. Exports of these grades increased 5.9%.

Recycled folding boxboard production for domestic use, which had turned in an essentially flat performance last year, posted a handsome 5.8% gain during the first six months of 1991. The strong overall performance of the folding boxboard category in a recessionary period may partly reflect market share gains vis-à-vis competing materials.

Total production of milk carton and food service board for domestic use edged up 0.3% during the first half of 1991. The largest component grade, milk carton stock, remained unchanged, while cup stock declined 5%, and plate, dish and tray stock advanced 5.7%. Production of milk carton and food service board for export was off 2.3% from the earlier period.

Production of other boxboard for domestic use was off 12.4% during the first half of this year. Gypsum wallboard facing, which was impacted by weak residential construction activity, plunged 30.6% between the first half of 1990 and the first half of this year. Weakness in such markets as textiles and paper held output of tube, can and drum stock to an annualized rate of 1.3 million tons during the first half of 1991, off 2.6% from the year-ago period.

FIBROUS MATERIALS

Paper and paperboard mills continue to increase the share of waste paper in their total fiber consumption. So far this year, for example, waste paper use increased 2.6%, compared to a 0.6% increase in wood pulp. At the same time, exports of waste paper rose sharply, with the five-month 1991 total 7.7% ahead of its year-ago rate.

Export demand is also offering strong support to market pulp production. The first-half 1991 chemical paper grade export total was 12.8% ahead of its corresponding 1990 rate. The gains were concentrated in shipments to Western Europe, Japan and the other Asian/African countries. Shipments to the domestic market were down by 6.6%, holding the gain in total shipments to 5.8%. Market pulp inventories, which had advanced 11% (52,000 short tons) in the first five months of this year, fell 19,000 tons in June, holding the total to 25 days of supply, which compares well with the year-end 1990 rate of 23 days.

IMPORTS AND EXPORTS

The gain in linerboard exports in the first five months of 1991 was an important factor in the 20% gain in total exports of paper, paperboard and products. Paper exports, however, also increased. While no single grade predominated, the rise in the total -- 23.4% -- brought the annual rate to 1.9 million tons per year, accounting for some 5% of domestic production.

Exports of converted products rose sharply: the 22.8% increase carried the total to 1.27 million tons per year, equivalent to 1.6% of total paper and paperboard production.

While exports of paper, paperboard and wood pulp have been moving rapidly upward, imports declined. The table at the top of page 9 shows that import reductions have spread well beyond newsprint to virtually every major category of paper and paperboard. Among the major printing-writing paper grades, for example, uncoated free sheet paper imports were 10.5% below year-earlier levels, coated papers 7.5%. Uncoated groundwood paper imports, however, accounting for 46% of the total new supply, were up by 3.1%.

SALES AND EARNINGS

Published data on sales and earnings of 26 paper and allied products companies indicate that these trends bottomed out during the first half of the year. As the table on page 10 shows, the rate of decline in both sales and earnings from year-ago levels held steady from the first to second quarters, while the ratio of net profits to sales showed some recovery from the low registered in the fourth quarter of 1990.

Technical Note: The Specialty Paper and Board Division has revised its data on shipments of Special Industrial Paper for 1990 and 1991, reducing the 1990 total by 37,000 tons. The Table on page 3 shows the new aggregates, together with the revised figures for total paper and total paper and paperboard.

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 7
JULY, 1991

PRODUCTION (000 TONS)

PAPER GRADES	(P) JUNE 1991	(R) MAY 1991	JUNE 1990	FIRST 6 MONTHS 1991	FIRST 6 MONTHS 1990	% CHANGE YR TO DATE 1991/1990
Newsprint	559	574	539	3,380	3,231	4.6
Printing & Writing	1,772	1,789	1,777	10,630	11,062	-3.9
Uncoated Groundwood (s)	142	137	142	843	866	-2.7
Coated Groundwood (s)	343	322	344	1,976	2,049	-3.5
Coated Free Sheet (s)	251	250	269	1,535	1,631	-5.9
Total Coated Paper (s)	594	572	613	3,511	3,680	-4.6
Uncoated Free Sheet Paper (s)	919	954	900	5,521	5,720	-3.5
Thin Paper (s)	15	18	16	104	125	-17.4
Cotton Fiber Paper (s)	12	13	14	78	85	-8.7
Bleached Bristols (s)	90	95	92	574	586	-2.0
Tissue Paper	474	472	479	2,873	2,865	0.3
Total Pkg & Other Paper	367	357	382	2,236	2,283	-2.1
Unbl. Kraft Paper (s)	195	185	208	1,177	1,197	-1.7
Bl. Kraft Paper (s)	31	33	37	204	242	-15.6
Specialty Pkg. Paper	47	46	45	294	269	9.4
Special Industrial Paper (s)	94	92	92	561	576	-2.5
TOTAL PAPER	3,172	3,192	3,177	19,119	19,440	-1.7
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,672	1,664	1,681	10,070	9,950	1.2
Unbleached Kraft Linerboard	1,538	1,556	1,583	9,365	9,337	0.3
Other Unbl. Kraft Paperboard	133	108	98	705	613	15.1
Semichemical Paperboard	467	472	467	2,822	2,837	-0.5
Bleached Paperboard	381	393	378	2,296	2,259	1.6
Recycled Paperboard	763	744	758	4,457	4,518	-1.3
TOTAL PAPERBOARD	3,282	3,273	3,283	19,646	19,565	0.4
TOTAL PAPER AND PAPERBOARD	6,465	6,324	6,593	38,765	39,005	-0.6

	MAY 1991	APR 1991	MAY 1990	FIRST 5 MONTHS 1991	FIRST 5 MONTHS 1990	% CHANGE 1991/1990
Dissolving & Special Alpha	92	115	103	550	537	2.4
Bleached Sulfite)	147	134	134	654	658	-0.6
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,344	2,376	2,211	11,745	11,353	3.4
Unbleached Sulfate	1,716	1,760	1,798	9,014	9,033	-0.2
Semichemical	335	346	366	1,718	1,797	-4.4
Groundwood & Thermomechanical	528	555	513	2,696	2,583	4.4
TOTAL PULP DIVISION DATA	5,162	5,285	5,124	26,377	25,961	1.6

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA July 31, 1991	1989	1990	1991	1991 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD -- Tons (000)			APRIL	MAY	JUNE		
Total Production (API): excluding :	76,785	78,748 R	6,324	6,465	6,454	77,529	-0.6
Total Seasonally Adjusted: construction :			6,421	6,401	6,549	77,613	-0.5
Imports (Including Products): and wet :E	12,910	13,006	997	1,008	1,000	12,214	-8.0
Exports (Including Products): machine :E	6,263	6,787	683	698	700	8,186	19.9
Apparent Consumption: grades :	83,432	84,967	6,735	6,712	6,849	81,641	-3.3
Paper Production % Tonnage Capacity	93.0	93.2	88.3	85.8	88.2	86.7	-
Paperboard Production % Tonnage Capacity	94.0	94.2	89.4	88.8	92.6	92.2	-
PAPER, PAPERBOARD AND PRODUCTS			MARCH	APRIL	MAY		
Imports: Including Construction and :	13,100	13,147	994	1,004	1,017	12,335	-7.9
Exports: WMB Grades (excl. HPB) :	6,300	6,796	723	685	700	8,165	19.6
MARKET WOOD PULP PRODUCTION - Tons (000)	8,664	8,798	743	783	708	9,010	8.5
TOTAL WOOD PULP PRODUCTION - Tons (000)	61,998 f	63,068 f	5,319	5,286	5,162	63,307	1.6
WOOD PULP IMPORTS - TONS (000)	5,005	4,893	400	415	382	4,922	-2.9
WOOD PULP EXPORTS - TONS (000)	5,766	5,905	600	528	576	6,396	11.5
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS: excluding :			MARCH	APRIL	MAY		
Wood Pulp: consumption for :	60,252	61,032	5,133	5,080	4,965	61,102	0.6
Waste Paper: construction & :	19,490	21,040	1,816	1,754	1,763	21,161	2.6
TOTAL: WMB grades :	79,742	82,072	6,949	6,834	6,728	82,263	1.1
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	98,414	99,194	8,161	8,271	8,108	99,494	0.2
EMPLOYMENT (000)			APRIL	MAY	JUNE		
Paper and Allied Products Total	697.4	699.3	687.1	687.0	694.3	689.9	-1.1
Pulp, Paper and Board Mills Total A	245.6	245.2	240.4	240.6	245.0	242.1	-1.1
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			APRIL	MAY	JUNE		
Paper and Allied Products	11.96	12.30	12.56	12.63	16.65	13.24	8.7
Pulp, Paper Mills A	14.72	15.18	15.43	15.52	15.60	15.43	2.9
Paperboard Mills E	14.76	15.25	15.50	15.69	15.44	15.53	3.1
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q3	1990 Q4	1991 Q1		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.72	16.74	14.02	13.07	12.60 Y	-24.6
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			APRIL	MAY	JUNE		
:IN PULP, PAPER : Production Workers	125.9	128.7	130.9	128.5	128.9	129.2	0.9
:AND BOARD MILLS: All Employees	126.5	129.3	131.5	129.3	130.1	130.1	1.3
PAPER AND ALLIED PRODUCTS (Million $)			APRIL	MAY	JUNE		
Industry Shipments (Dept. of Commerce)*	130,501	131,080	9,949	9,952	10,140	120,938	-7.2
Pulp, Paper and Paperboard*	57,700	56,356	4,217	4,252	4,427	52,266	-8.3
Inventories (End of Period) - Total Industry*	12,571	12,980	13,720	13,576	13,455	13,455	8.3
Pulp, Paper and Paperboard*	4,980	5,305	5,626	5,644	5,558	5,558	9.0
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q3	1990 Q4	1991 Q1		
Sales (Corporations Only)	113,573	115,523	29,037	28,674	27,400	109,600	-4.8
Earnings (Corporations Only)	7,047	4,882	1,214	614	867	3,468	-40.4
Depreciation (Corporations Only)	5,010	5,578	1,389	1,481	1,441	5,764	8.3
Net Worth (Corporations Only)	45,642	45,951	45,601	45,951	46,717	46,717	-2.6
PRICE INDEXES (Bureau of Labor Stats)1982=100			APRIL	MAY	JUNE		
Pulp, Paper & Products, ex. Building Grades	132.4	132.9	130.7	129.9	129.0	131.1	-1.6
Wood Pulp	157.4	151.2	125.7	122.5	118.1	126.1	-19.5
Waste Paper	157.1	138.9	133.4	128.8	121.0	130.9	-10.1
Paper	129.6	128.8	127.8	127.1	125.9	128.6	0.5
Paperboard	140.1	135.7	128.3	127.0	126.7	129.5	-6.0
PAPER DEMAND (INDEXED: 1987=100)			APRIL	MAY	JUNE		
Total Paper Production *	103.7	106.6	104.7	104.3	105.4	103.9	-1.6
Paper New Supply *	102.4	104.6	99.3	99.5	100.3	99.7	-4.5
Demand Indicators - (Weighted Average) *	107.8	110.1	108.8	108.6	108.9	108.9	-1.1
Production of Nondurable Goods *(21.2%)	108.4	107.8	105.8	108.2	108.8	108.2	-1.3
Disposable Income *(23.9%)	107.2	108.1	107.0	107.2	107.6	107.1	1.5
Total Printing and Publishing *(54.9%)	108.6	111.9	110.7	110.1	110.3	110.8	-1.0
PAPERBOARD DEMAND (INDEXED: 1987=100)			APRIL	MAY	JUNE		
Total Paperboard Production *	103.0	105.4	102.6	102.3	105.9	104.9	0.6
Production for Domestic Use	103.2	104.6	100.2	100.4	103.4	102.5	-0.6
Demand Indicators - (Weighted Average) *	107.2	107.9	105.2	106.1	108.8	105.5	-2.0
Production of Consumer Goods *(62.06%)	108.6	107.3	105.5	106.4	107.0	105.7	-1.4
Production of Equipment *(5.75%)	112.3	115.5	112.9	112.7	112.9	112.9	-1.8
Production of Materials *(32.19%)	107.4	107.8	103.3	104.2	105.2	104.0	-3.1
MARKET DATA			MARCH	APRIL	MAY		
Newsprint Consumption by Publishers - Tons (000)	13,483	13,368	1,054	1,024	1,054	12,214	-8.8
Newspaper Pub. and Printing Empl. Total(000)	472	476	465	463	463	466	-1.9
Magazine Advertising Pages (PIB, Inc.)	181,985	175,553	13,328	15,037	13,148	153,213	-12.9
Wholesalers Sales and Inventories (Million $)			MARCH	APRIL	MAY		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales	50,015	51,454	3,948	4,089	4,021	48,834	-3.4
Inventories (End of Period)	4,132	4,300	4,061	3,951	3,922	3,922	-1.7
FIBRE BOX DATA (Fibre Box Association)			APRIL	MAY	JUNE		
Fibre Box Shipments (Million square feet)	313,400	318,102	28,033	26,963	25,739	313,884	-2.0
Container'bd Inventory at Mill & Plant (000 Tons)	2,589	2,765	2,880	2,586	2,638	2,638	5.4
RETAIL TRADE (Billion $)							
Total Retail Sales *	1,742	1,808	151.0	152.2	151.9	[illegible]	0.7
Nondurable Goods Stores Sales *	1,089	1,153	97.5	98.3	98.0	1,173	3.2
GENERAL ECONOMIC DATA			APRIL	MAY	JUNE		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*	108.1	109.2	105.5	106.2	106.9	106.0	-2.6
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)	112.2	116.3	116.0	116.5	116.3	116.9	2.1
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)	124.0	130.7	135.2	135.6	136.0	135.2	5.1
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q3	1990 Q4	1991 Q1		
G.N.P. or Expenditure - Current $	5,201	5,465	5,515	5,527	5,558	5,589	3.3
G.N.P. or Expenditure - 1982 $	4,118	4,157	4,170	4,153	4,124	4,126	-0.6
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	671	681				649	

f - Wood Pulp Prod exc del., explo & scr. R - Revised E - Last month estimated by API A - Est. by API Y - 1st quarter est. by Dept. of Commerce * Seasonally Adjusted

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.8 AUGUST 1991

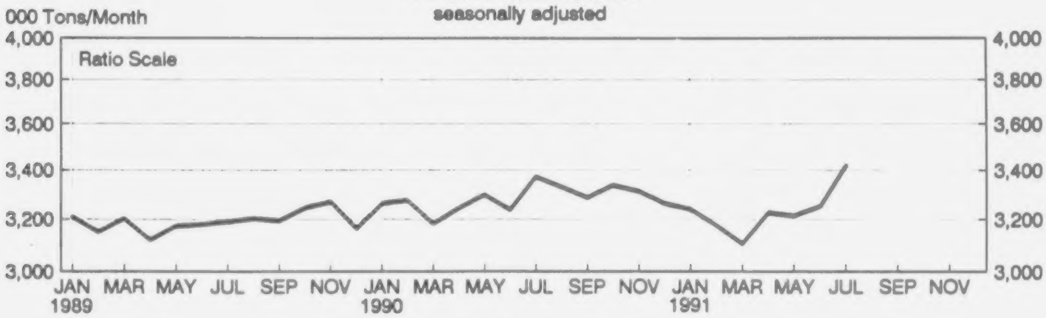
PAPER AND PAPERBOARD PRODUCTION: UPTREND CONTINUES

Paper and paperboard production continued along the rising trend evident in June. The June-July seasonally adjusted rate exceeded 80 million tons per year, with gains evident in both the paper and paperboard totals.

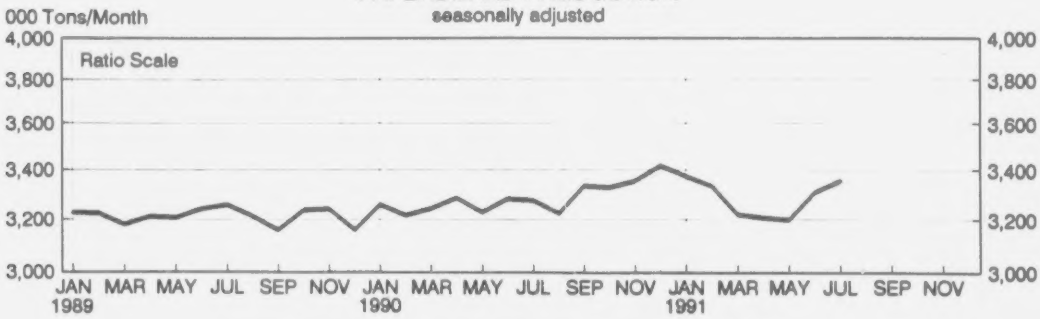
Preliminary data indicate that total paper and paperboard production held close to its July high in August; the July-August annual rate may have moved above 81 million tons, setting a new high. The seasonally-adjusted rate of paper production appears to have receded slightly from its July spike in August, but paperboard production probably showed further gains.

Among the paper grades, the July increases were concentrated in communication papers -- newsprint and printing-writing papers. Kraft linerboard production led the paperboard sector, with the semichemical and solid bleached grades showing only modest growth and recycled paperboard falling from its May-June levels (see Table on page 3). Paperboard production for export remained strong, with the 7-month total 14% ahead of its corresponding 1990 high.

PAPER PRODUCTION
seasonally adjusted



PAPERBOARD PRODUCTION
seasonally adjusted



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Paper: Newsprint consumption may be recovering from its second quarter 1991 doldrums, with gains in the seasonally adjusted totals reported in both June and July. The increases in demand were concentrated in the domestic newsprint industry. The January-July production rate of 6.8 million tons was 4.8% over its corresponding 1990 figure. Newsprint imports declined from May to June, with the first half 1991 total 10% below its January-June 1990 level.

The demand for printing-writing papers was also concentrated on the domestic industry. Imports of these grades fell from May to June 1991, bringing the first half total 4.6% below its year-earlier level. While the uncoated groundwood grades did show a small year-to-year increase, the totals for coated papers and the uncoated free sheet grades were each down by more than 10% (see upper table on page 9).

Shipments of printing-writing papers moved sharply above their June level in July, reaching a level second only to the October 1990 peak, while mill inventories declined 6%. Total purchases of these papers also posted a strong increase in July, with the seasonally adjusted rate climbing back to the record-highs established in the second half of 1990.

Most of the strength in the July printing-writing paper shipments total can be traced to gains in uncoated free sheet papers. New orders for these grades, for example, exceeded one million tons in each month since May, bringing the backlog of unfilled orders as of the end of July, 220,000 tons above its April low, while the shipments spurted up by 13% from June to July.

The strength in the uncoated free sheet papers largely reflected gains in bond paper demand: shipments of total bond and writing papers in the first seven months of 1991 were up 6.9% as unwatermarked bond paper gained 7.2% and form bond 1%. Form bond production, which had been lagging in the first half, moved strongly upward in July. Most of the other major printing-writing paper grades, including envelope and offset papers, lagged their respective year-ago totals in this period.

Coated groundwood papers showed only modest growth in July, with its year-to-date total down 3.3% as advertising in magazines remains well below year-ago levels. Shipments of coated free sheet papers rose smartly in July, in response to strong demand by catalog publishers.

Tissue paper production, which had been ahead of its record-high 1990 levels during the first 4 months of 1991, failed to match the year-ago totals in the subsequent 3 months, and the January-July total fell 1% from its year-ago rate.

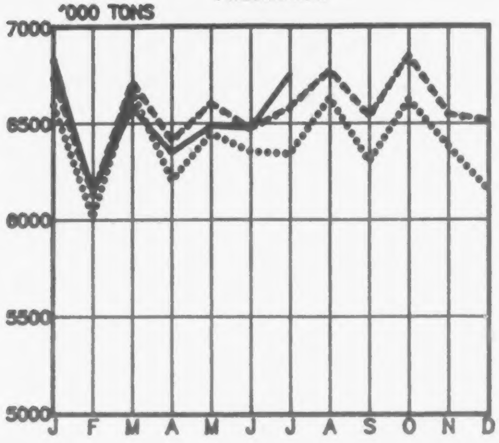
The packaging and industrial converting grades remain weak, with unbleached kraft paper shipments down 2.9% and bleached kraft papers down 15%. Some of the slack in the unbleached kraft paper grades has been taken up by bags made partly from recovered papers,

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		APRIL	MAY	JUNE (R)	JULY (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
	1989	1990	1991	1991	1991	1991	1991	
PAPER								
Newsprint – Production	6,088	6,610	573	574	559	586	6,799	4.6
– Shipments	6,079	6,621	553	574	548	568	6,684	2.6
Printing & Writing: Total Shipments #	21,626	22,371	1,739	1,793	1,777	1,960	21,616	-2.5
Groundwood Paper – Shipments	1,743	1,806	138	140	145	159	1,751	-1.9
– New Orders	1,741	1,868	130	146	178	148	1,828	0.5
– Unshipped Orders	193	179	238	249	274	280	280	56.4
Coated Groundwood – Shipments	4,059	4,233	315	322	343	350	3,988	-3.3
Coated Free Sheet – Shipments	3,157	3,303	244	250	253	290	3,132	-4.4
Total Coated Papers – Shipments	7,215	7,536	558	572	596	640	7,120	-3.8
– New Orders	7,171	7,430	582	601	623	646	7,183	-3.7
– Unshipped Orders	706	722	565	604	598	638	638	-11.6
Unctd Free Sheet – Shipments	11,081	11,503	915	957	922	1,044	11,281	-1.5
– New Orders	11,097	11,479	924	1,002	1,009	1,130	11,349	-2.5
– Unshipped Orders	748	802	511	554	626	731	731	-8.8
Thin Papers – Shipments	262	218	15	16	14	17	194	-15.9
Cotton Fiber Paper – Shipments	161	155	13	13	12	10	147	-8.5
Bleached Bristols – Shipments	1,164	1,152	100	94	89	89	1,125	-2.2
Tissue Paper – Production	5,636	5,802	477	472	474	440	5,679	-1.0
Total Packaging & Other Paper	4,916	4,576	383	358	370	356	4,474	-1.9
Unbl. Kraft Paper – Shipments	2,681	2,377	207	185	195	186	2,337	-2.9
Bl. Kraft Paper – Shipments	468	484	34	33	31	34	409	-15.2
Specialty Pkg. Paper – Production	520	563	49	47	47	48	597	11.1
Special Industrial Paper – Shipments	1,248	1,153	94	93	97	88	1,132	-0.3
TOTAL PAPER PRODUCTION – UNADJUSTED #	38,266	39,359	3,172	3,197	3,180	3,342	38,569	-1.0
TOTAL PAPER PRODUCTION – SEAS ADJ			3,226	3,213	3,252	3,420	38,803	-1.0
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,388	2,171	2,276	2,262	2,397	27,408	1.3
Cont'bd For Dom Use for Fibre Boxes	23,752	24,432	1,885	2,015	1,954	2,100	23,976	-0.3
Total Linerboard	16,399	16,875	1,280	1,389	1,330	1,468	16,501	0.0
Unbleached Kraft	15,833	16,414	1,212	1,318	1,263	1,393	15,749	-2.0
Solid Bleached	178	139	12	12	12	13	145	7.0
Recycled	388	323	56	59	55	62	607	108.7
Corrugating Medium	7,339	7,549	602	624	621	630	7,454	-1.1
Semichemical	5,554	5,567	447	456	452	466	5,483	-1.1
Recycled	1,785	1,982	155	167	169	164	1,972	-1.0
Container Chip and Filler	14	7	2	2	3	1	21	126.4
Other Containerboard for Dom Use	307	282	25	22	31	24	291	-0.9
Containerboard for Export	2,369	2,674	262	239	277	274	3,141	15.6
Boxboard	12,092	12,035	996	1,004	1,024	1,006	12,136	0.0
Boxboard for Packaging for Dom Use	7,076	6,949	613	600	626	611	7,369	5.6
Folding Boxboard	5,370	5,198	466	455	478	465	5,592	8.3
Solid Bleached	1,980	1,818	166	166	164	174	1,963	6.5
Unbleached Kraft	987	970	93	87	102	102	1,133	21.3
Recycled	2,403	2,410	208	202	212	189	2,495	5.3
Set-up Boxboard for Dom Use	288	290	21	23	25	21	269	-11.7
Milk Carton & Food Service Dom Use	1,419	1,461	125	123	123	126	1,508	0.1
Other Boxboard for Domestic Use	4,152	4,145	295	308	316	306	3,707	-11.9
Boxboard for Export	863	941	89	97	82	89	1,061	11.5
Paperboard Production by Furnish	38,519	39,423	3,167	3,280	3,285	3,403	39,544	0.9
Unbleached Kraft	19,490	20,357	1,595	1,671	1,676	1,798	20,381	1.7
Semichemical	5,691	5,710	462	472	467	481	5,662	-0.7
Solid Bleached Kraft	4,521	4,399	383	393	380	394	4,610	2.8
Recycled	8,817	8,956	727	744	763	729	8,891	-0.9
Paperboard Production for Export	3,232	3,615	350	335	359	363	4,202	14.5
Unbleached Kraft	2,363	2,691	266	245	280	279	3,207	17.4
Semichemical	138	142	15	16	14	15	179	14.3
Bleached Kraft	693	732	66	71	57	62	756	3.0
Recycled	38	49	4	4	7	7	60	29.5
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,519	39,423	3,167	3,280	3,285	3,403	39,544	0.9
TOTAL PAPERBOARD PROD – SEAS ADJ			3,209	3,200	3,309	3,356	39,437	0.9
PAPER AND PAPERBOARD – UNADJ #	76,785	78,782	6,338	6,477	6,466	6,745	78,113	-0.1
PAPER AND PAPERBOARD – SEAS ADJ			6,435	6,413	6,560	6,777	78,239	-0.1

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted # – 1990 Series Revised

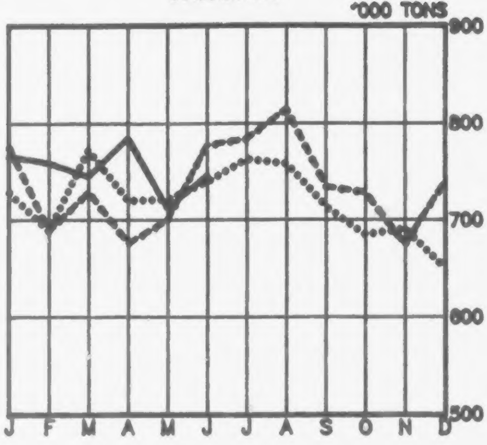
TOTAL PAPER AND PAPERBOARD

PRODUCTION



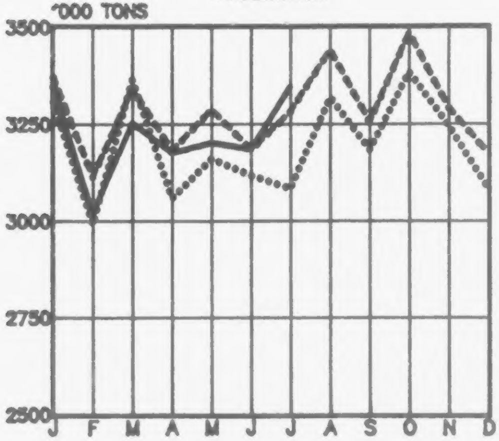
MARKET WOOD PULP

PRODUCTION



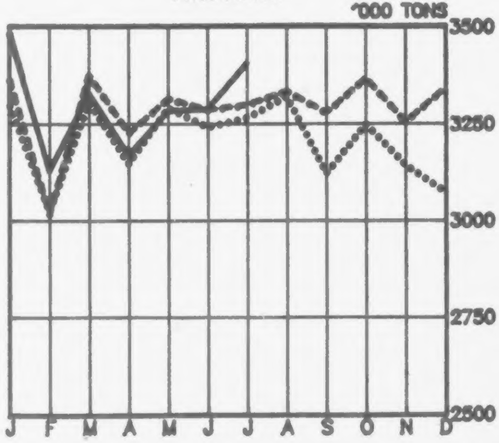
TOTAL PAPER

PRODUCTION



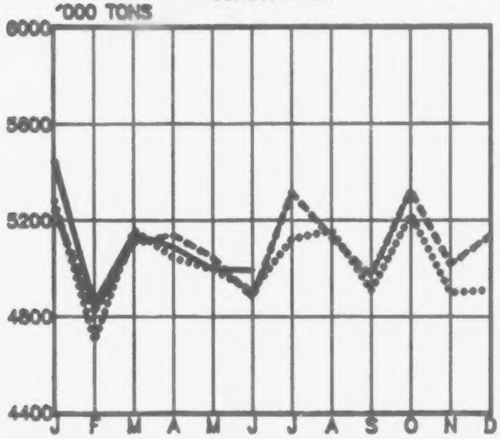
TOTAL PAPERBOARD

PRODUCTION



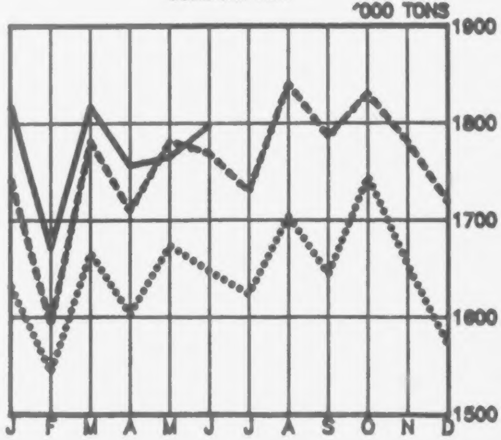
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 ········ 1990 ━ ━ ━ ━ 1991 ━━━━

WOOD PULP STATISTICS (Thousands of Tons)			YEAR 1989	YEAR 1990	MAR 1991	APR 1991	MAY (R) 1991	JUN (P) 1991	Annual Rate Y-T-D 1991	% Change From Same Period Last Year
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,998	63,068	5,319	5,285	5,188	5,197	63,202	1.6
	Imports	A	5,005	4,893	400	415	382	414	4,929	-0.5
	Exports	#	5,766	5,905	600	528	576	573	6,475	9.8
	New Supply		61,237	62,056	5,119	5,172	4,995	5,038	61,656	0.6
Dissolving Pulp	Production		1,425	1,293	124	115	92	124	1,348	3.6
	Imports		284	222	7	18	16	17	172	-23.9
	Exports	#	798	782	70	50	71	84	783	-2.6
	New Supply		912	733	61	83	37	57	737	1.9
Paper Grades Chemical Pulp	Production		50,181	51,192	4,310	4,270	4,232	4,222	51,324	1.7
	Imports	A	4,370	4,326	363	370	330	368	4,409	1.1
	Exports	#	4,913	5,080	524	475	498	482	5,640	11.9
	New Supply		49,639	50,438	4,149	4,164	4,065	4,109	50,093	0.6
Groundwood and Thermo-Mech	Production		6,029	6,363	547	555	528	520	6,431	4.0
	Imports	A	351	345	31	27	35	28	347	-4.8
	Exports	#	55	44	6	3	6	7	52	-3.3
	New Supply		6,324	6,665	571	579	558	541	6,726	3.5
Semi-Chemical	Production		4,363	4,219	338	346	335	331	4,099	-3.8
	Imports									
	Exports									
	New Supply		4,363	4,219	338	346	335	331	4,099	-3.8
MARKET WOOD PULP										
Total Market Wood Pulp	Production		8,664	8,798	743	783	710	745	9,003	3.8
	Imports		3,539	3,215	223	283	235	242	3,037	-7.8
	Exports		5,309	5,561	562	479	490	548	5,982	11.5
	New Supply		6,893	6,451	404	587	455	439	6,057	-8.2
Dissolving Pulp	Production		1,422	1,292	123	115	92	124	1,345	3.5
	Imports		210	170	4	18	16	18	159	-2.4
	Exports		821	782	75	51	78	89	824	3.9
	New Supply		810	679	53	82	30	53	680	1.5
Paper Grades Chemical Pulp	Production		7,242	7,506	620	669	618	621	7,658	3.9
	Imports		3,072	2,813	200	246	200	208	2,662	-7.9
	Exports		4,489	4,779	487	428	413	459	5,158	12.8
	New Supply		5,825	5,540	333	487	405	371	5,162	-9.2
Groundwood Pulp and All Other	Production		0	0	0	0	0	0	0	N.M.
	Imports		258	232	18	19	20	15	216	-10.5
	Exports		0	0	0	0	0	0	0	N.M.
	New Supply		258	232	18	19	20	15	216	-10.5

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

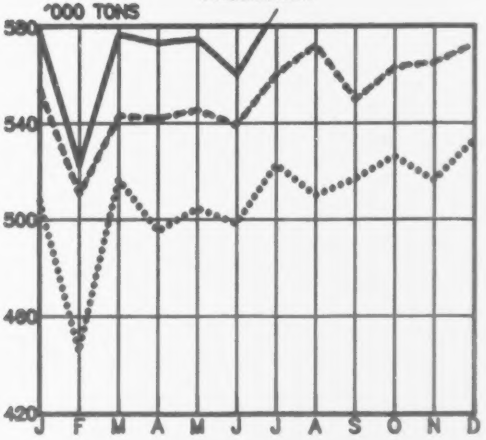
NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data. N.M. – Not Meaningful. # – 1989 Exports revised by API.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1989	YEAR 1990	MAR 1991	APR 1991	MAY (R) 1991	JUN (P) 1991	Annual Rate 1991	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,072	6,949	6,834	6,751	6,777	82,154	1.3
Total Wood Pulp	60,252	61,032	5,133	5,080	4,988	4,982	60,930	0.9
Waste Paper	19,490	21,040	1,816	1,754	1,763	1,795	21,225	2.4
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	216	198	210	214	214	-0.1
Producers' Market Inventories	342	476	483	521	532	515	515	16.2
Consumers' Purchased Inventories #	519	392	406	394	389	351	351	-27.7
Waste Paper at Paper & Bd. Mills	1,082	909	907	960	1,025	1,002	1,002	-2.4
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	23	24	25	25	25	19.0

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # Includes all grades of wood pulp
P – Preliminary; R – Revised; 0 – Indicates zero to five-hundred short tons

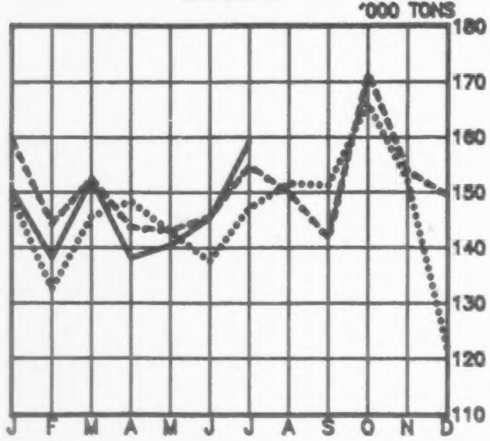
NEWSPRINT

PRODUCTION



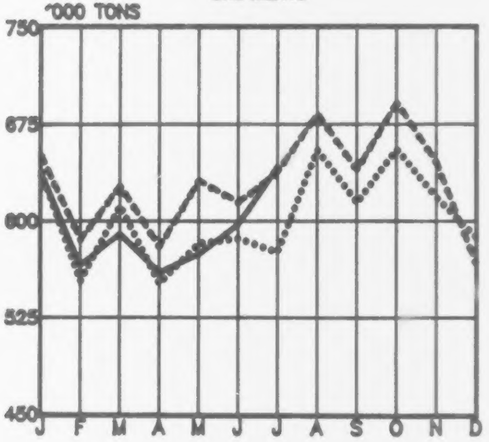
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



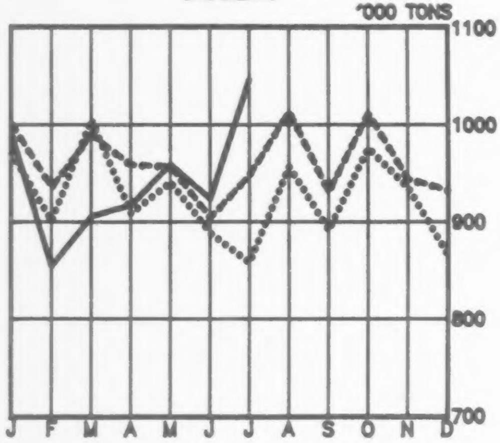
COATED PAPER

SHIPMENTS



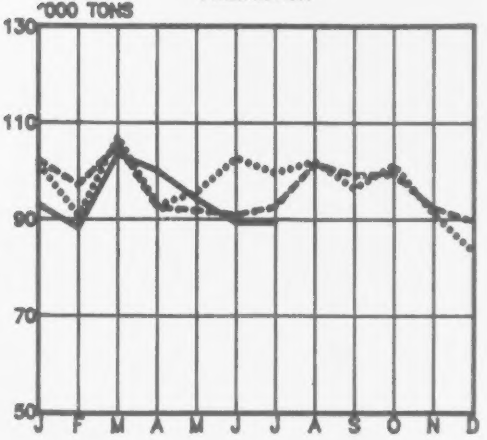
UNCOATED FREE SHEET PAPERS

SHIPMENTS



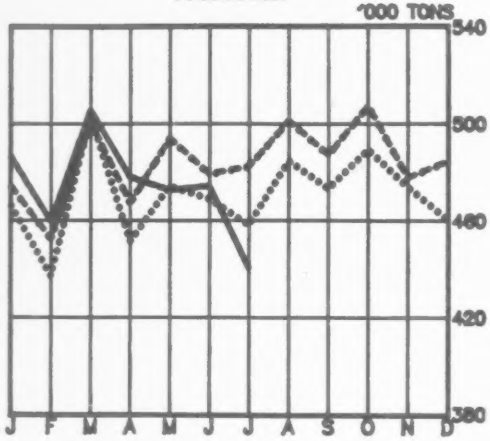
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1989 ········ 1990 ------1991 ——

FIBROUS RAW MATERIALS Thousands of Standard (128 Cu. ft.) Cords	YEAR 1989	YEAR 1990	MARCH 1991	APRIL 1991	MAY 1991	JUNE 1991	ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,279	99,304	8,161	8,097	7,934	8,120	98,524	-0.2
– Total Consumption #	98,414	99,109	8,161	8,271	8,108	7,992	98,896	0.1
– Residues *	34,539	35,727	2,856	2,937	2,858	2,823	34,440	-3.4
– Inventories	5,462	5,961	5,670	5,082	4,936	4,880	4,880	-5.6
So. Atlantic – Total Receipts	31,982	32,536	2,518	2,658	2,477	2,536	31,224	-4.9
– Total Consumption	32,239	32,412	2,641	2,697	2,586	2,577	32,056	-1.4
– Residues *	9,961	11,181	858	876	803	835	10,434	-5.7
– Inventories	936	1,334	1,194	1,183	1,117	1,076	1,076	-0.6
Northeast – Total Receipts	7,242	7,264	633	578	533	584	7,354	3.2
– Total Consumption	7,072	7,080	603	582	561	555	6,960	-4.0
– Residues *	1,575	1,505	145	139	129	133	1,664	10.5
– Inventories	522	449	523	465	395	359	359	-5.0
South Central – Total Receipts	35,840	37,246	3,238	3,136	3,140	3,222	38,390	5.8
– Total Consumption	35,791	36,784	3,148	3,109	3,208	3,153	38,256	6.3
– Residues *	10,539	11,516	993	1,019	1,021	978	11,924	4.2
– Inventories	1,336	1,879	1,629	1,432	1,233	1,187	1,187	-0.4
North Central – Total Receipts	7,020	7,074	575	464	548	581	7,250	3.1
– Total Consumption	6,963	7,129	605	642	628	598	7,434	3.8
– Residues *	1,422	1,308	101	105	111	98	1,216	-8.2
– Inventories	938	1,014	1,203	1,029	942	920	920	4.9
West – Total Receipts	17,195	15,184	1,197	1,262	1,238	1,197	14,306	-7.6
– Total Consumption #	16,349	15,704	1,164	1,241	1,125	1,109	14,190	-10.9
– Residues *	11,042	10,217	759	798	794	779	9,202	-10.9
– Inventories	1,730	1,285	1,121	973	1,249	1,338	1,338	-18.3

SOURCE: American Pulpwood Association

* – Consumption of Residues in cords equivalent

# – 1990 total revised

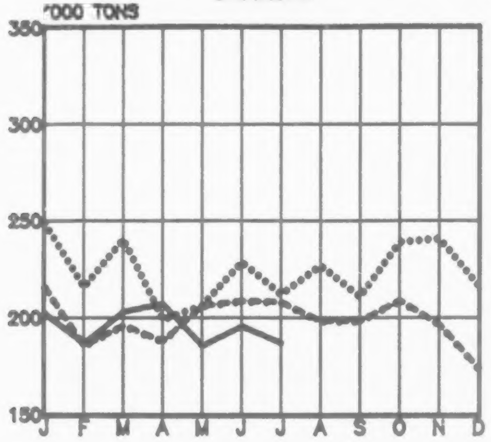
UNITED STATES TRADE WITH CANADA	IMPORTS FROM CANADA						ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
	YEAR 1990		MAY 1991		JUNE 1991			
	Tons	($000)	Tons	($000)	Tons	($000)	Tons	
Pulpwood, Roundwood (In cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood chips	709,197	22,413	66,692	2,409	58,764	2,228	707,873	1.2
Wood Pulp, Total	4,322,418	2,514,301	338,073	151,260	365,416	160,094	4,289,530	-3.8
Waste Fibrous Materials, Total	130,452	31,442	12,409	2,711	10,021	1,919	132,901	-10.1
Paper, Board & Products, Total	11,191,700	6,317,590	885,867	511,668	869,511	505,164	10,600,720	-7.5
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	11,047,032	5,968,425	872,969	480,104	856,665	472,241	10,453,873	-7.6
Paper, Paperboard & Products	11,066,239	6,284,416	877,746	509,616	861,288	502,927	10,527,095	-7.2
Paper & Paperboard, Only	10,921,571	5,936,260	865,036	478,052	848,421	470,004	10,380,247	-7.3
Paper, Total	10,385,505	5,723,101	821,236	459,969	796,179	449,165	9,836,529	-6.1
Newsprint	8,118,161	4,162,493	648,248	346,037	603,162	321,148	7,655,961	-9.7
Printing, Writing & Rel. Pap.	1,914,083	1,295,073	147,012	93,639	168,785	108,803	1,874,828	0.3
Pack. & Ind. Conv. Paper	211,903	121,069	17,683	10,886	15,824	9,447	204,628	-3.5
Special Industrial Paper	57,441	68,444	3,463	5,206	3,566	5,376	41,582	-34.3
Tissue Paper	83,917	76,023	4,631	4,241	4,842	4,390	58,530	-21.8
Paperboard, Total	536,067	212,149	43,803	18,064	52,243	20,839	544,718	10.2
Convtd Paper&Paperbd Products	144,668	349,166	12,708	31,564	12,846	32,923	146,848	-4.8
Wet Machine Board	884	757	48	44	27	26	646	-32.7
Construction Paper & Board	124,576	32,418	7,872	2,008	8,217	2,211	72,980	-35.8

EXPORTS TO CANADA								
Pulpwood, Roundwood (In cubic meters)	1,038,727	36,801	82,340	2,343	146,497	4,856	1,892,798	304.2
Pulpwood chips	193,841	9,066	23,374	1,115	28,094	1,321	261,777	38.1
Wood Pulp, Total	328,456	165,508	19,255	9,362	22,189	11,302	278,373	-25.6
Cotton Pulp & Other Pulp	4,373	4,284	275	256	389	324	4,727	6.1
Waste Paper	653,204	116,346	48,852	9,001	47,470	8,213	583,370	-8.8
Paper, Board & Products, Total	1,194,633	1,317,384	118,632	127,100	120,951	127,931	1,383,948	15.9
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	88,853	80,226	89,330	79,670	1,039,816	15.8
Paper, Paperboard & Products	1,192,443	1,315,696	117,231	126,263	120,064	127,348	1,377,608	15.6
Paper & Paperboard, Only	890,912	818,590	87,452	79,389	88,443	79,086	1,033,475	15.3
Paper, Total	521,586	595,952	52,557	58,261	53,296	57,586	643,018	24.7
Newsprint	20,813	11,389	4,169	2,495	3,079	1,758	31,069	63.5
Printing, Writing & Rel. Pap.	372,852	424,207	36,896	41,320	37,051	39,943	451,986	20.2
Pack. & Ind. Conv. Paper	52,367	36,780	5,187	3,794	4,975	3,770	62,428	28.6
Special Industrial Paper	59,301	106,279	4,281	8,271	5,522	9,501	61,758	4.8
Tissue Paper	16,253	17,297	2,025	2,382	2,670	2,614	35,778	173.7
Paperboard, Total	369,326	222,638	34,896	21,127	36,147	21,500	390,457	2.7
Convtd Paper&Paperbd Products	301,531	497,106	29,780	46,874	31,621	48,261	344,133	16.4
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,689	1,401	837	887	584	6,340	191.8

SOURCE: Bureau of Census, Department of Commerce

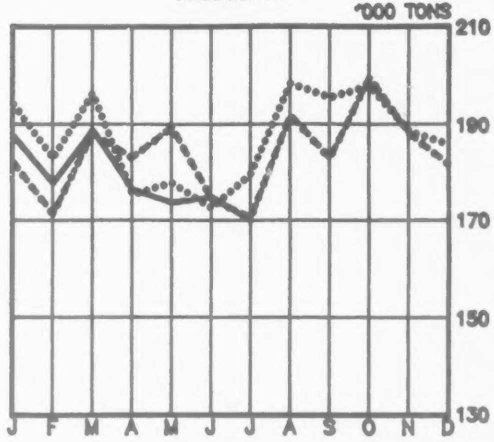
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



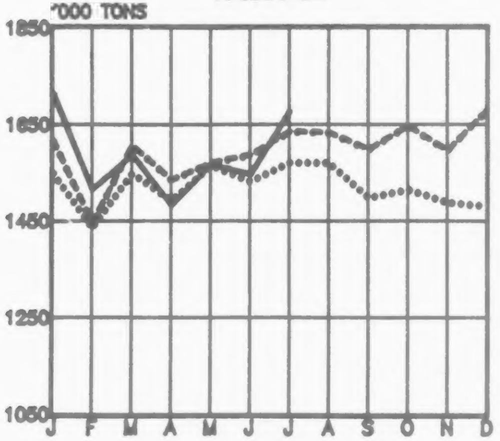
OTHER PAPER

PRODUCTION



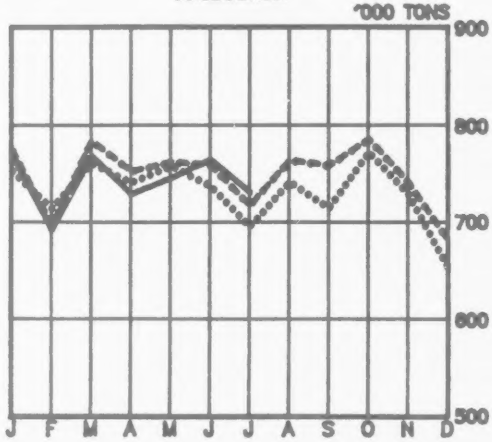
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



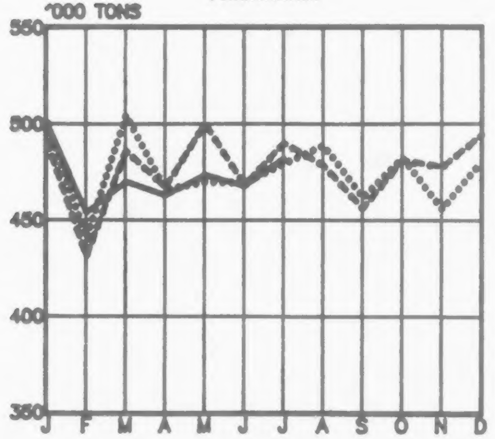
RECYCLED PAPERBOARD

PRODUCTION



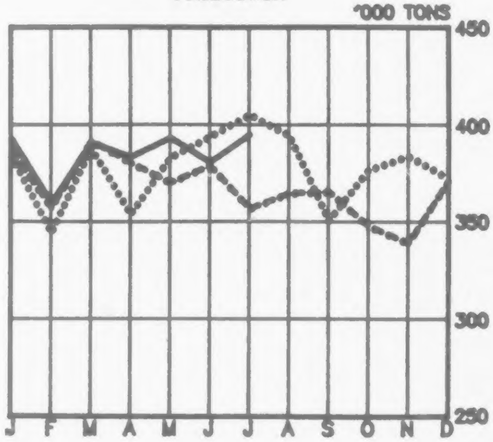
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1989 ········ 1990 ------ 1991 ———

PULP, PAPER AND PAPERBOARD IMPORTS	YEAR 1990		MAY 1991		JUNE 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood Chips	710,415	22,550	64,692	2,409	58,764	2,228	708,428	1.1
Total All Imports	18,177,409	11,292,256	1,412,343	839,896	1,400,845	826,990	17,304,020	-6.5
Wood Pulp Total	4,893,355	2,831,327	382,061	171,492	413,610	181,746	4,928,510	-0.5
Waste Paper	122,539	26,349	12,317	2,623	10,027	1,905	135,210	-1.4
Other Fibrous Materials	14,037	9,286	799	665	809	850	8,437	-42.4
Paper Board & Products Total	13,147,479	8,425,293	1,017,166	665,115	976,400	642,490	12,231,863	-8.7
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	12,728,760	7,425,583	985,546	582,884	944,884	557,153	11,840,724	-8.8
Paper Ppbd & Prds ex Cnst&WMB	13,006,238	8,382,641	1,008,124	662,175	967,216	639,528	12,148,065	-8.5
Paper & Paperboard Only	12,587,519	7,382,931	976,504	579,944	935,701	554,191	11,756,925	-8.5
Paper Total	11,961,306	7,077,036	926,891	555,768	876,350	526,688	11,135,125	-9.2
Newsprint	8,299,557	4,247,131	654,716	349,042	611,709	325,027	7,786,074	-10.4
Printing & Writing	3,104,863	2,248,424	236,011	164,387	228,937	161,101	2,883,874	-4.6
Uncoated Groundwood	1,337,581	843,550	105,606	65,811	101,811	64,809	1,326,235	1.6
Coated Print.& Impreg. Pap.	936,046	749,082	78,664	60,354	85,815	52,286	844,807	-10.7
Uncoated Free Sheet	752,448	564,479	44,757	30,071	53,102	34,424	821,735	-10.6
Thin (except Cigarette)	11,365	14,296	1,356	1,679	731	918	14,408	31.5
Bristols	67,424	77,017	5,628	6,471	7,479	8,664	76,689	18.8
Total Pkg & Other Paper	425,697	462,237	30,777	37,569	30,072	35,493	383,712	-11.2
Unbleached Kraft Paper	235,352	116,655	16,789	8,748	16,449	8,084	218,595	-6.8
Other Pkg. & Indust. Paper	190,345	345,582	13,987	28,821	13,623	27,409	165,118	-16.4
Tissue	131,189	119,244	5,388	4,769	5,631	5,067	81,464	-29.7
Paperboard, Total	626,213	305,895	49,613	24,176	59,351	27,503	621,800	5.0
Test or Containerboard	113,629	48,929	9,080	3,786	11,276	4,234	97,974	-24.9
Semi-Chemical Corrugating	111,935	31,152	6,561	1,368	6,197	1,435	68,080	-39.1
Other Paperboard	400,649	227,180	34,972	19,023	41,878	21,833	455,746	30.2
Convtd Paper&Paperbd Products	418,719	999,710	31,629	82,232	31,516	85,337	391,140	-6.0
Paper Products, Total	313,106	807,967	23,363	67,069	23,667	69,088	294,018	-6.6
Paperboard Products, Total	105,613	191,744	8,257	15,162	7,849	16,249	97,122	-6.1
Wet machine Board	1,132	991	57	56	45	48	861	-30.9
Construction Paper & Board E	140,110	41,661	8,985	2,894	9,139	2,914	82,938	-34.6
Notes								
Other: No Weight Avail. ($000)		136,809		10,927		12,727	119,631	-0.1
Total Imports Incl. Other($000)		11,429,064		850,823		839,717	10,519,153	-9.2

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		MAY 1991		JUNE 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	1,122,468	39,971	84,153	2,429	151,352	4,924	1,928,022	237.6
Pulpwood Chips	4,637,669	412,018	461,039	41,632	406,452	35,599	5,100,248	17.8
Total All Exports	19,342,224	9,075,342	1,878,931	853,882	1,829,994	846,959	21,624,113	12.2
Wood Pulp,Total	5,905,339	3,155,671	575,527	266,710	572,546	262,907	6,474,765	9.8
Cotton Pulp and Other Pulp	135,632	104,806	11,288	8,242	6,464	6,245	104,081	-23.8
Waste and Old Paper	6,504,965	779,687	592,317	72,586	515,923	69,937	6,770,640	5.7
Paper, Board & Products,Total	6,796,388	5,035,177	699,801	506,344	735,062	517,871	8,274,027	21.0
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	591,826	343,806	625,448	353,618	6,994,577	20.5
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,883	697,780	504,812	733,006	516,544	8,251,862	20.9
Paper & Paperboard, Only	5,738,750	3,443,249	589,806	342,275	623,392	352,292	6,972,203	20.3
Paper, Total	1,519,052	1,455,104	168,875	147,961	184,206	151,210	1,942,106	29.3
Newsprint	535,993	293,182	54,246	28,071	64,594	33,143	645,670	25.0
Printing & Writing	664,824	717,700	84,284	79,658	85,354	77,694	903,003	33.4
Uncoated Groundwood	75,299	83,574	12,179	6,256	15,228	9,616	128,167	70.6
Clay Coated Paper	218,684	215,289	24,821	22,466	22,575	19,858	256,258	18.4
Uncoated Free Sheet	232,369	306,127	30,688	34,836	28,432	33,747	340,487	44.7
Other Printing & Writing	138,472	132,709	16,596	14,100	19,119	14,474	178,090	18.8
Total Pkg. & Other Paper	283,584	403,949	25,921	35,122	29,547	35,404	333,795	20.8
Unbleached Kraft	112,828	80,480	10,774	5,792	12,292	6,261	136,255	20.5
Other Pkg. & Indust. Paper	170,756	343,469	15,147	29,330	17,255	29,143	197,539	20.9
Tissue	34,651	40,273	4,423	5,111	4,712	4,969	59,641	88.1
Paperboard, Total	4,219,698	1,988,144	420,931	194,313	439,186	201,082	5,030,094	17.2
Solid Wood Pulp	3,993,101	1,867,502	403,314	183,599	420,270	188,446	4,807,957	19.0
Total Linerboard	2,924,140	1,076,705	288,063	102,576	298,867	104,123	3,475,175	16.9
Bleached Kraft Linerboard	335,444	150,819	27,968	12,371	28,445	[illegible]	379,937	31.2
Unbleached Kraft Linerbd	2,588,697	925,886	260,095	90,205	270,423	[illegible]	3,095,238	15.4
Other Unbleached Kraft	253,945	144,169	33,209	17,788	35,607	20,169	404,784	47.9
Other Bleached Kraft	764,550	628,659	74,239	60,804	78,005	61,758	851,166	12.9
Semi-Chemical Corrugating	50,466	17,769	7,803	2,433	7,791	2,396	76,833	89.5
Recycled Paperboard	226,598	120,643	17,617	10,714	18,916	12,636	222,137	-12.3
Convtd Paper&Paperbd Products	1,047,768	1,585,435	107,974	162,536	109,614	164,252	1,279,449	23.9
Paper Products, Total	440,793	1,012,642	49,991	110,027	52,712	112,195	577,911	38.8
Paperboard Products, Total	606,975	572,793	57,983	52,510	56,901	52,057	701,538	13.8
Wet Machine Board	487	232	13	5	52	20	372	-49.3
Construction Paper & Board E	9,384	6,262	2,007	1,627	2,004	1,307	22,003	160.8
Notes								
Other: No Weight Avail. ($000)		49,964		5,915		5,441	60,967	35.3
Total Exports Incl. Other($000)		9,125,306		859,797		852,400	9,987,819	8.0

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.

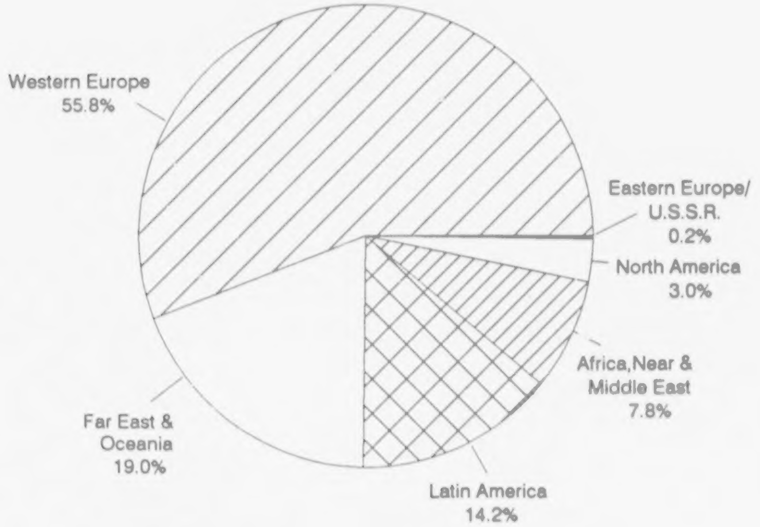
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		APR 1991	MAY 1991	JUNE 1991	JULY 1991	Annual Rate Y-T-D 1991	% Change from same Period Last Year
	1989	1990						
Pulp, Paper and Products except Building Grades	132.4	132.9	130.7	129.9	129.0	128.8	130.7	-1.8
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	130.7	129.9	129.1	129.1	130.8	-1.6
Total Wood Pulp	157.4	151.2	125.7	122.5	118.1	117.2	125.1	-19.7
Total Paper	129.6	128.8	127.8	127.1	125.9	125.8	128.2	0.1
Writing Paper, exc. Newsprint	130.5	129.1	128.1	124.8	125.9	125.8	127.6	-0.6
Newsprint	122.5	119.6	121.7	122.1	119.7	119.0	123.4	4.9
Total Paperboard	140.1	135.7	128.3	127.0	126.7	127.4	129.1	-6.0
Total Paper and Paperboard *	132.9	131.0	128.0	127.1	126.2	126.3	128.5	-1.9
Converted Products	131.7	135.1	135.6	135.2	134.9	134.7	135.6	0.5
Waste Paper	157.1	138.9	133.4	128.8	121.0	113.2	128.2	-10.9
All Commodities	112.2	116.3	116.0	116.5	116.3	116.0	116.7	2.0
Industrial Commodities	111.6	115.8	115.5	116.1	116.0	116.0	116.5	2.7

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

DISTRIBUTION OF KRAFT LINERBOARD EXPORTS FROM TEN MAJOR SUPPLYING NATIONS

1990



Ten Nation Total: 5,193,882 Metric Tons

* Includes People's Republic of China

with total usage of all unbleached kraft and similar papers off by only 0.9%.

Paperboard: Spurred by a resurgence in shipments of fibre boxes, production of containerboard for domestic use rose 7% from June to July 1991, bringing the year-to-date total within 0.3% of its 1990 rate. Shipments of fibre boxes, which had generally been below year-ago monthly levels in the first half of 1991, rose 8.7% from June to July 1991 to a 4.8% gain over July 1990. While part of the production increase went into box plant inventories -- mill inventories declined -- total mill and box plant inventories as of July 31, 1991 were at 5.3 weeks of supply, well below the 6+ weeks of supply evident in the early months of the year.

Demand for folding boxboard has been particularly strong in 1991, with production for domestic use up 6% in the first 7 months of 1991. While all the major furnish sectors shared in this growth, unbleached kraft folding boxboard for the domestic market -- supported by the output of a new machine -- gained a spectacular 21%. Production of the milk carton and food service grades remained flat, as gains in plate, dish and tray stock were offset by weakness in demand for cups.

The declines in output of other boxboard for domestic use can be traced to the demand for the non-packaging grades. A lackluster housing market kept gypsum wallboard facings 29% below year-ago levels, while low demand for autos held panelboard production 37% off the 1990 pace.

FIBROUS MATERIALS

Consumption of recovered paper at paper and paperboard mills continues to take a larger and larger share of the total furnish. Data for the first half of 1991 indicate that mills increased their use of waste paper by 2.4% over their first half 1990 rate, compared to a 0.9% increase in use of wood pulp. Although exports of waste paper in June dropped well below their April-May highs, the six-month 1991 total remained 5.7% above its 1990 counterpart. There is, however, some problem with the comparability of the 1990 and 1991 data: the 1990 data were based on the U.S. Census Bureau's count of waste paper leaving the U.S.; starting with January 1991 exports to Canada are based on Statistics Canada reports on imports of waste paper from the United States. So far this year Canada has accounted for 8.6% of total U.S recovered paper exports.

Production of chemical paper grade market pulp strengthened in July, bringing the 7-month total to an annual rate of 7.7 million tons -- 2.8% over corresponding 1990 rate. The June-July 1991 increase, however, went entirely into inventory. With shipments in July 10% below production, inventories increased to 30 days of supply from the 25 days recorded at the end of June.

Shipments to the domestic market, which had once been on a par with exports, continue to lag. The January-July 1991 total was 8% below its year-ago level, compared to a 12% gain in exports. Major gainers in the export market included Western Europe, which increased 17% and accounted for 43% of total exports; Japan, which increased 20%, accounting for 20% of the total. Shipments to the other Asian/African countries rose 17%, with the combined total comprising 25% of total exports.

WORLD LINERBOARD EXPORT PATTERNS

U.S. exports of kraft linerboard have grown briskly during recent years in response to cyclical factors and improvements in the underlying competitiveness of U.S. producers. Specifically, they surged 9.5% in 1989, 17.0% in 1990, and exceeded their year-ago volume by 16.9% during the first six months of this year.

The U.S. is far and away the world's largest exporter of kraft linerboard. According to the Bureau of the Census, U.S. exports of kraft linerboard reached 2.65 million metric tons in 1990, which was 2.4 times higher than Swedish exports of kraft linerboard, which ranked second, and 7.7 times higher than Canadian exports, which ranked third. According to API's International Department, the U.S. share of kraft linerboard exports from ten major supplying nations rose to 51% in 1990, up from 48% in 1989 and 45% in 1988. The ten supplying nations are listed in the following table.

EXPORTS OF KRAFT LINERBOARD BY MAJOR SUPPLYING COUNTRIES

	Metric Tons		Percentage Change	
	1990	1989	1990/89	1989/88
United States	2,652,775	2,267,738	+ 17.0	+ 9.6
Sweden	1,107,105	1,137,643	- 2.7	- 0.7
Canada	342,972	225,657	+ 52.0	- 22.9
Brazil	308,158	273,498	+ 12.7	- 32.7
Finland	215,126	265,614	- 19.0	+ 0.8
Portugal	170,401	160,669	+ 6.0	+ 34.3
France	162,657	150,551	+ 8.0	+ 20.2
Austria	114,326	110,881	+ 3.1	- 2.7
Norway	84,666	66,225	+ 27.1	+ 22.6
Spain	35,696	32,057	+ 11.4	- 3.5
TOTAL	**5,193,882**	**4,690,553**	**+ 10.7**	**+ 1.4**

The ten nations listed in the above table supplied 2.9 million metric tons of kraft linerboard to Western Europe in 1990, accounting for 56% of their total kraft linerboard exports. The Nordic nations accounted some 45% of total kraft linerboard exports to Western Europe last year, while the U.S. share came to 26%. Cross-border shipments within the region (excluding Nordic shipments) represented 15% of total kraft linerboard exports to Western Europe in 1990. Brazil's and Canada's market shares were 8% and 5%, respectively.

The ten supplying nations exported 985,883 metric tons of kraft linerboard to the Far East in 1990, with the U.S. accounting for an overwhelming 84% of that total, followed by Canada with an 11% share and the Nordic nations with a 3% share. The ten nations also exported 1.3 million metric tons of linerboard to the "rest of the world" in 1990, with the U.S. share at 81%. The pie chart (see page 10) shows the relative distribution of kraft linerboard exports from the ten supplying nations by region of destination.

U.S. Exports of Kraft Linerboard

Shipments to the Far East and Oceania, including the People's Republic of China and Japan, accounted for 31% of total U.S. kraft linerboard exports last year, making it the largest importing region. U.S. exports of kraft linerboard to the People's Republic of China declined 14.5% in 1990 to 191,639 metric tons after surging 56% in 1989. China's overall imports of kraft linerboard from the ten major supplying nations were off 12% in 1990. However, a large portion of U.S. kraft linerboard exports to Hong Kong, which jumped 14% last year to 224,340 metric tons, was transshipped to China, suggesting that China's demand for linerboard probably remained approximately stable in 1990.

U.S. kraft linerboard exports to Japan declined 9% last year, to 126,645 metric tons. According to its government, Japan reduced kraft linerboard imports by 15.5% in 1990, which marked the fourth consecutive annual decline.

U.S. exports of kraft linerboard to the newly industrialized economies of the Fast East -- Korea, Taiwan, Hong Kong, Singapore, Thailand and Malaysia -- advanced 7.7% last year, to 399,000 metric tons.

U.S. kraft linerboard exports to Western Europe surged 32% last year, to 762,561 metric tons, following a 4% gain in 1989. Total Western Europe imports of kraft linerboard from the ten supplying nations listed in the table were up 10% last year to 2.9 million metric tons. However, shipments to this region from the Nordic nations declined 1%, with tonnage from Finland down sharply.

For additional information see Exports of Kraft Linerboard and Corrugating Material from Major Supplying Countries to World Markets. Copies of this report have been mailed to API member companies. The cost to non-members is $150.00 (domestic; plus tax for companies resident in New York City or State) and $155.00 (foreign) from the American Paper Institute, International Department, Department IJ, 260 Madison Avenue, New York, N.Y. 10016.

MONTHLY STATISTICAL SUMMARY INSERT

VOL. 69, NO. 8
AUGUST, 1991

PRODUCTION (000 TONS)

	(P) JULY	(R) JUNE	JULY	FIRST 7 MONTHS		% CHANGE YR TO DATE
	1991	1991	1990	1991	1990	1991/1990
PAPER GRADES						
Newsprint	586	559	560	3,966	3,790	4.6
Printing & Writing	1,960	1,777	1,859	12,610	12,937	-2.5
Uncoated Groundwood (s)	159	145	155	1,021	1,041	-1.9
Coated Groundwood (s)	350	343	357	2,327	2,405	-3.3
Coated Free Sheet (s)	290	253	280	1,827	1,911	-4.4
Total Coated Paper (s)	640	596	637	4,153	4,316	-3.8
Uncoated Free Sheet Paper (s)	1,044	922	947	6,580	6,680	-1.5
Thin Paper (s)	17	14	18	113	134	-15.9
Cotton Fiber Paper (s)	10	12	11	86	94	-8.5
Bleached Bristols (s)	89	89	92	656	671	-2.2
Tissue Paper	440	474	482	3,313	3,346	-1.0
Total Pkg & Other Paper	356	370	378	2,610	2,661	-1.9
Unbl. Kraft Paper (s)	186	195	207	1,363	1,404	-2.9
Bl. Kraft Paper (s)	34	31	39	239	281	-15.2
Specialty Pkg. Paper	48	47	45	348	313	11.1
Special Industrial Paper (s)	88	97	87	660	662	-0.3
TOTAL PAPER	3,342	3,180	3,278	22,498	22,734	-1.0
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,798	1,676	1,736	11,889	11,686	1.7
Unbleached Kraft Linerboard	1,673	1,542	1,632	11,058	10,969	0.8
Other Unbl. Kraft Paperboard	126	133	104	831	717	16.0
Semichemical Paperboard	481	467	489	3,303	3,327	-0.7
Bleached Paperboard	394	380	356	2,689	2,615	2.8
Recycled Paperboard	729	763	716	5,187	5,234	-0.9
TOTAL PAPERBOARD	3,403	3,285	3,296	23,068	22,861	0.9
TOTAL PAPER AND PAPERBOARD	6,745	6,466	6,575	45,566	45,595	-0.1

	JUNE	MAY	JUNE	FIRST 6 MONTHS		% CHANGE
	1991	1991	1990	1991	1990	1991/1990
Dissolving & Special Alpha	124	92	114	674	651	3.6
Bleached Sulfite)	124	147	136	778	793	-1.9
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,306	2,370	2,237	14,077	13,591	3.6
Unbleached Sulfate	1,792	1,716	1,823	10,806	10,856	-0.5
Semichemical	331	335	334	2,049	2,131	-3.8
Groundwood & Thermomechanical	520	528	510	3,215	3,093	4.0
TOTAL PULP DIVISION DATA	5,197	5,188	5,153	31,599	31,114	1.6

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA August 30, 1991	1989	1990	1991	1991 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD -- Tons (000)			MAY	JUNE	JULY		
Total Production (API)................: excluding :............................	76,785	78,782 R	6,477	6,466	6,745	78,113	-0.1
Total Seasonally Adjusted..........: construction :............................			6,413	6,560	6,777	78,239	-0.1
Imports (Including Products).......: and wet :......E............................	12,910	13,006	1,008	967	1,000	12,127	-8.4
Exports (Including Products).......: machine :......E............................	6,263	6,787	698	733	700	8,273	21.9
Apparent Consumption...............: grades :............................	83,432	85,002 R	6,724	6,795	7,077	82,093	-3.1
Paper Production % Tonnage Capacity............................	93.0	93.2	86.0	88.4	89.2	88.9	-
Paperboard Production % Tonnage Capacity............................	94.0	94.2	89.0	92.7	91.9	92.2	-
PAPER, PAPERBOARD AND PRODUCTS			APRIL	MAY	JUNE		
Imports.....:Including Construction and :............................	13,100	13,147	1,004	1,017	976	12,232	-8.7
Exports.....: WMB Grades (excl. HPB) :............................	6,300	6,796	685	700	735	8,274	21.0
MARKET WOOD PULP PRODUCTION - Tons (000)............................	8,664	8,798	783	710	745	9,002	3.8
TOTAL WOOD PULP PRODUCTION - Tons (000).......I............................	61,998	63,068	5,285	5,188	5,197	63,202	1.6
WOOD PULP IMPORTS - TONS (000)............................	5,005	4,893	415	382	414	4,929	-0.5
WOOD PULP EXPORTS - TONS (000)............................	5,766	5,905	528	576	573	6,475	9.8
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS....: excluding :............................			APRIL	MAY	JUNE		
Wood Pulp............................: consumption for :............................	60,252	61,032	5,080	4,988	4,982	60,930	0.9
Waste Paper............................: construction & :............................	19,490	21,040	1,754	1,763	1,795	21,225	2.4
TOTAL............................: WMB grades :............................	79,742	82,072	6,834	6,751	6,777	82,154	1.3
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	98,414	99,109 R	8,271	8,108	7,992	98,896	0.1
EMPLOYMENT (000)			MAY	JUNE	JULY		
Paper and Allied Products..........Total............................	697.4	699.3	687.0	694.3	692.2	690.2	-1.2
Pulp, Paper and Board Mills........Total......A............................	245.6	245.2	240.6	244.8	244.8	242.5	-1.3
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			MAY	JUNE	JULY		
Paper and Allied Products............................	11.96	12.30	12.63	12.66	12.78	12.60	3.3
Pulp, Paper Mills..................A............................	14.72	15.18	15.52	15.58	15.80	15.48	3.0
Paperboard Mills..................E............................	14.76	15.25	15.69	15.49	15.61	15.55	3.2
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q4	1991 Q1	1991 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.53 R	14.06	13.20	11.38	11.93 Y	-27.8
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			MAY	JUNE	JULY		
:IN PULP, PAPER :...Production Workers............................	125.9	128.8 R	128.7	129.2	132.9	129.9	1.3
:AND BOARD MILLS:...All Employees............................	126.5	129.3	129.5	130.4	134.1	130.8	1.7
PAPER AND ALLIED PRODUCTS (Million $)			MAY	JUNE	JULY		
Industry Shipments (Dept. of Commerce)*............................	130,501	131,080	9,952	10,284	10,288	121,545	-7.0
Pulp, Paper and Paperboard*............................	57,700	56,356	4,252	4,430	4,355	52,270	-6.5
Inventories (End of Period) - Total Industry*............................	12,571	12,980	13,576	13,332	13,216	13,216	2.9
Pulp, Paper and Paperboard*............................	4,980	5,305	5,644	5,560	5,511	5,511	6.3
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q4	1991 Q1	1991 Q2		
Sales (Corporations Only)............................	113,573	115,523	28,674	27,384	27,862	109,536	-4.9
Earnings (Corporations Only)............................	7,047	4,882	614	868	792	3,472	-40.3
Depreciation (Corporations Only)............................	5,010	5,578	1,481	1,441	1,420	5,764	6.3
Net Worth (Corporations Only)............................	45,642	45,951	45,951	46,714	46,398	46,714	-2.6
PRICE INDEXES (Bureau of Labor Stats)1982=100			MAY	JUNE	JULY		
Pulp, Paper & Products, ex. Building Grades............................	132.4	132.9	129.9	129.0	128.8	130.7	-1.8
Wood Pulp............................	157.4	151.2	122.5	118.1	117.2	125.1	-19.7
Waste Paper............................	157.1	138.9	128.8	121.0	113.2	128.2	-10.9
Paper............................	129.6	128.8	127.1	125.9	125.8	128.2	0.1
Paperboard............................	140.1	135.7	127.0	126.7	127.4	129.1	-6.0
PAPER DEMAND (INDEXED: 1987=100)			MAY	JUNE	JULY		
Total Paper Production *............................	103.7	106.7	104.4	105.7	111.2	105.1	-1.0
Paper New Supply *............................	102.4	104.6	99.6	99.9	104.6	100.5	-4.3
Demand Indicators - (Weighted Average) *............................	107.8	110.1	108.9	109.6	109.8	109.2	-0.8
Production of Nondurable Goods..........*....(21.2%)............................	106.4	107.8	106.4	107.4	107.8	106.5	-1.0
Disposable Income............................*....(23.9%)............................	107.2	108.1	107.5	108.1	108.0	107.4	1.5
Total Printing and Publishing..............*....(54.9%)............................	108.6	111.9	110.5	111.2	111.3	111.0	-0.7
PAPERBOARD DEMAND (INDEXED: 1987=100)			MAY	JUNE	JULY		
Total Paperboard Production *............................	103.0	105.4	102.6	106.0	107.6	105.3	0.9
Production for Domestic Use	103.2	104.6	100.4	103.3	104.9	102.9	-0.5
Demand Indicators - (Weighted Average) *............................	107.2	107.9	106.2	107.0	107.5	105.9	-1.8
Production of Consumer Goods...........*....(62.06%)............................	106.6	107.3	106.5	107.2	107.6	106.0	-1.1
Production of Equipment.....................*....(5.75%)............................	112.3	115.5	112.6	112.4	112.7	112.8	-1.9
Production of Materials......................*....(32.19%)............................	107.4	107.8	104.6	105.7	106.4	104.5	-3.0
MARKET DATA			APRIL	MAY	JUNE		
Newsprint Consumption by Publishers - Tons (000)............................	13,493	13,368	1,024	1,052	1,001	12,176	-9.0
Newspaper Pub. and Printing Empl. Total(000)............................	472	476	463	463	463	465	-2.1
Magazine Advertising Pages (PIB, Inc.)	181,995	175,849 R	15,037	13,148	12,644	153,006	-12.8
Wholesalers Sales and Inventories (Million $)			APRIL	MAY	JUNE		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales............................	50,015	51,454	4,069	3,996	3,905	48,288	-4.0
Inventories (End of Period)............................	4,132	4,300	3,951	3,954	3,890	3,890	-3.9
FIBRE BOX DATA (Fibre Box Association)			MAY	JUNE	JULY		
Fibre Box Shipments (Million square feet)............................	313,400	318,102	26,949	25,722	27,845	315,419	-1.1
Container'bd Inventory at Mill & Plant (000 Tons)............................	2,589	2,765	2,586	2,637	2,706	2,706	2.0
RETAIL TRADE (Billion $)							
Total Retail Sales *............................	1,742	1,808	152.7	152.6	153.4	1,817	1.0
Nondurable Goods Stores Sales *............................	1,089	1,153	98.6	98.4	99.2	1,176	3.3
GENERAL ECONOMIC DATA			MAY	JUNE	JULY		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*............................	108.1	109.2	106.4	107.1	107.6	106.3	-2.8
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)............................	112.2	116.3	116.5	116.3	116.0	116.7	2.0
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)............................	124.0	130.7	135.6	136.0	136.2	136.3	5.0
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billion$)			1990 Q4	1991 Q1	1991 Q2		
G.N.P. or Expenditure - Current $............................	5,201	5,465	5,527	5,558	5,616	5,587	3.3
G.N.P. or Expenditure - 1982 $............................	4,118	4,157	4,153	4,124	4,123	4,124	-0.7
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	671	681				653	

I - Wood Pulp Prod exc def., explo & scr. R - Revised E - Last month estimated by API A - Est. by API Y - 1st quarter est. by Dept. of Commerce * Seasonally Adjusted

A2500-2

Paper, Paperboard & Wood Pulp

MONTHLY STATISTICAL SUMMARY - Vol.69 No.9 SEPTEMBER 1991

PAPER AND PAPERBOARD PRODUCTION

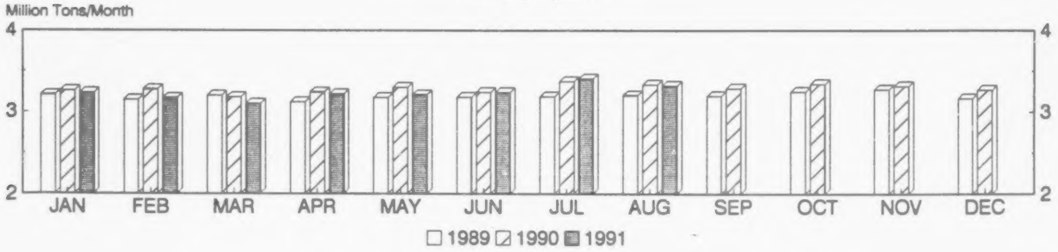
Total paper and paperboard production in August 1991 remained near its record high July rate, keeping the two-month average above 81 million tons per year and the January-August total 0.4% above that of 1990.

As the charts below show, the July-August gains were concentrated in paperboard production, mostly in unbleached kraft linerboard and boxboard for domestic use. Paper output, while sharply above its first half lows, just about matched its year-ago rate. Seasonally adjusted paper production followed last year's pattern and spiked in July as mills shifted shut-downs away from the traditional July period. Production receded in August but remained at a relatively high rate.

The value of shipments from pulp, paper and paperboard mills was 6.9% below its year-ago level in the January-August period, though the volume of shipments was nearly unchanged. The Department of Commerce also reported that aggregate first-half 1991 sales for paper and allied products companies were down by 4.4%, while pretax profits fell 45.4% from their comparable 1990 figure (see table at bottom of page 10).

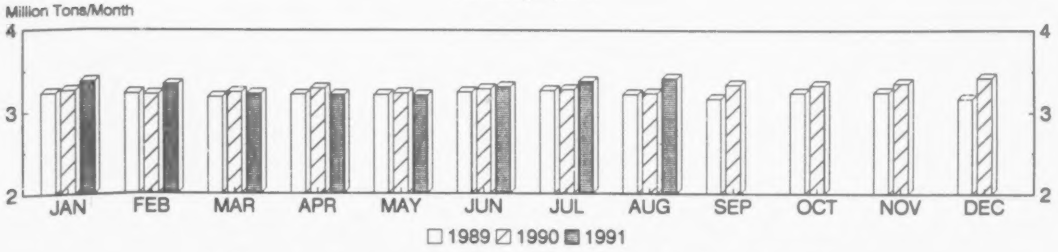
TOTAL PAPER PRODUCTION

seasonally adjusted



TOTAL PAPERBOARD PRODUCTION

seasonally adjusted



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Paper: In the face of declining demand for newsprint in the U.S., year-to-date domestic production increased 4.2% from its 1990 total. As the following table shows, domestic shipments have displaced Canadian sources, markedly increasing the U.S. share in each of the last two years.

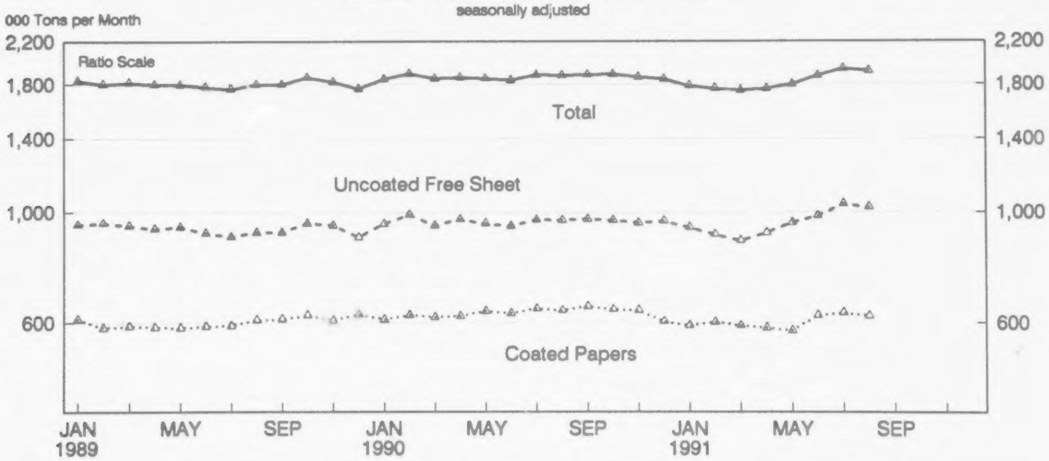
Newsprint Consumption and Total North American Shipments to United States
(000 Tons)

	1987	1988	1989	1990	1991*
Consumption	12,303	12,244	12,241	12,126	11,007
N.A. Shipments	12,099	12,022	11,781	12,003	11,221
U.S. Shipments as % of N.A. Shipments	41.5%	41.9%	42.7%	46.5%	49.1%

* 8-month annual rate

Printing-writing paper shipments are down 2.1% compared to 1990. After bottoming out in March, the seasonally adjusted rate of shipments increased 9.4% in the subsequent five months. The July-August annual rate was at a record high of nearly 24 million tons. The chart below shows the trend of total printing-writing papers and those of uncoated free sheet and total coated papers for the January 1989 - August 1991 period.

PRINTING/WRITING PAPER SHIPMENTS
seasonally adjusted



Much of the recent increase in shipments came out of inventory, with actual production showing only a slight rise. By the end of August, printing-writing paper inventories had fallen 10% from their June peak. Liquidation was reported in all major grades, with uncoated free sheet and coated papers showing the greatest declines.

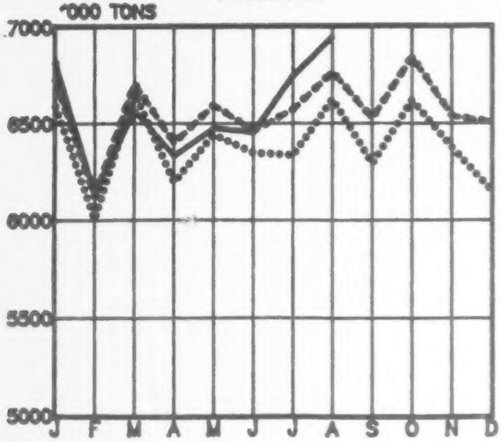
Uncoated free sheet shipments are down 0.7% year-to-date -- but the seasonally adjusted August rate was 16.7% above the March low. Recent support has come from commercial printers, office

PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR		MAY	JUNE	JULY (R)	AUGUST (P)	Annual Rate Y–T–D	% Change From Same Period
	1989	1990	1991	1991	1991	1991	1991	Last Year
PAPER								
Newsprint – Production	6,088	6,610	574	559	586	580	6,819	4.2
– Shipments	6,079	6,621	574	548	568	565	6,695	2.2
Printing & Writing: Total Shipments	21,626	22,371	1,793	1,778	1,960	1,991	21,900	–2.1
Groundwood Paper – Shipments	1,743	1,806	140	145	159	152	1,760	–1.4
– New Orders	1,741	1,868	146	178	148	183	1,873	1.7
– Unshipped Orders	193	202	249	274	280	293	293	45.0
Coated Groundwood – Shipments	4,059	4,233	322	343	350	359	4,028	–3.5
Coated Free Sheet – Shipments	3,157	3,303	250	253	290	297	3,186	–4.1
Total Coated Papers – Shipments	7,215	7,536	572	596	640	656	7,214	–3.8
– New Orders	7,171	7,430	601	623	646	681	7,307	–3.2
– Unshipped Orders	706	732	604	598	638	635	635	–13.2
Unctd Free Sheet – Shipments	11,081	11,503	957	922	1,044	1,057	11,456	–0.7
– New Orders	11,097	11,479	1,002	1,013	1,131	1,078	11,554	–1.4
– Unshipped Orders	748	834	554	630	736	742	742	–11.0
Thin Papers – Shipments	262	218	16	14	17	17	194	–15.2
Cotton Fiber Paper – Shipments	161	155	13	12	10	12	146	–8.4
Bleached Bristols – Shipments	1,164	1,152	94	89	89	97	1,130	–2.5
Tissue Paper – Production	5,636	5,802	472	474	440	484	5,694	–1.3
Total Packaging & Other Paper	4,916	4,576	367	369	352	385	4,532	–0.9
Unbl. Kraft Paper – Shipments	2,681	2,377	185	195	186	188	2,327	–3.2
Bl. Kraft Paper – Shipments	468	484	33	31	34	39	416	–13.1
Specialty Pkg. Paper – Production	520	563	48	48	47	54	610	N.C.
Special Industrial Paper – Shipments	1,248	1,153	101	95	84	103	1,179	N.C.
TOTAL PAPER PRODUCTION – UNADJUSTED	38,266	39,359	3,206	3,179	3,338	3,439	38,946	–0.8
TOTAL PAPER PRODUCTION – SEAS ADJ			3,222	3,251	3,416	3,332	38,991	–0.8
PAPERBOARD – PRODUCTION								
Containerboard	26,428	27,388	2,276	2,262	2,411	2,460	27,693	2.0
Cont'bd For Dom Use for Fibre Boxes	23,752	24,432	2,015	1,954	2,114	2,134	24,201	0.4
Total Linerboard	16,399	16,875	1,389	1,330	1,482	1,492	16,698	0.7
Unbleached Kraft	15,833	16,414	1,318	1,263	1,408	1,422	15,935	–1.2
Solid Bleached	178	139	12	12	13	11	143	3.8
Recycled	388	323	59	55	62	59	620	101.0
Corrugating Medium	7,339	7,549	624	621	630	640	7,483	–0.5
Semichemical	5,554	5,567	456	452	466	466	5,497	–1.0
Recycled	1,785	1,982	167	169	164	174	1,986	1.0
Container Chip and Filler	14	7	2	3	1	1	20	142.6
Other Containerboard for Dom Use	307	282	22	31	24	30	300	3.4
Containerboard for Export	2,369	2,674	239	277	274	297	3,193	16.2
Boxboard	12,092	12,035	1,004	1,024	1,008	1,062	12,215	0.6
Boxboard for Packaging for Dom Use	7,076	6,949	600	626	612	639	7,408	6.3
Folding Boxboard	5,370	5,198	455	478	466	493	5,634	9.2
Solid Bleached	1,980	1,818	166	164	174	170	1,972	7.1
Unbleached Kraft	987	970	87	102	102	113	1,161	24.5
Recycled	2,403	2,410	202	212	190	210	2,501	5.0
Set–up Boxboard for Dom Use	288	290	23	25	21	25	273	–10.6
Milk Carton & Food Service Dom Use	1,419	1,461	123	123	126	121	1,501	–0.4
Other Boxboard for Domestic Use	4,152	4,145	308	316	306	341	3,755	–11.0
Boxboard for Export	863	941	97	82	89	82	1,052	9.8
Paperboard Production by Furnish	38,519	39,423	3,280	3,285	3,419	3,522	39,908	1.6
Unbleached Kraft	19,490	20,357	1,671	1,676	1,813	1,864	20,651	2.6
Semichemical	5,691	5,710	472	467	481	477	5,670	–0.6
Solid Bleached Kraft	4,521	4,399	393	380	394	389	4,617	3.3
Recycled	8,817	8,956	744	763	731	792	8,970	–0.3
Paperboard Production for Export	3,232	3,615	335	359	363	379	4,244	14.6
Unbleached Kraft	2,363	2,691	245	280	279	299	3,255	17.7
Semichemical	138	142	16	14	15	11	173	14.5
Bleached Kraft	693	732	71	57	62	63	755	2.3
Recycled	38	49	4	7	7	5	60	24.4
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,519	39,423	3,280	3,285	3,419	3,522	39,908	1.6
TOTAL PAPERBOARD PROD – SEAS ADJ			3,200	3,309	3,372	3,413	39,649	1.6
PAPER AND PAPERBOARD – UNADJ	76,785	78,782	6,486	6,465	6,757	6,961	78,854	0.4
PAPER AND PAPERBOARD – SEAS ADJ			6,422	6,560	6,788	6,745	78,640	0.4

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted N.C. – 1991 and 1990 data under review

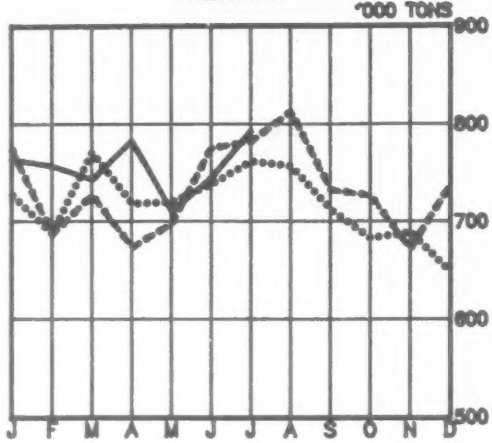
TOTAL PAPER AND PAPERBOARD

PRODUCTION



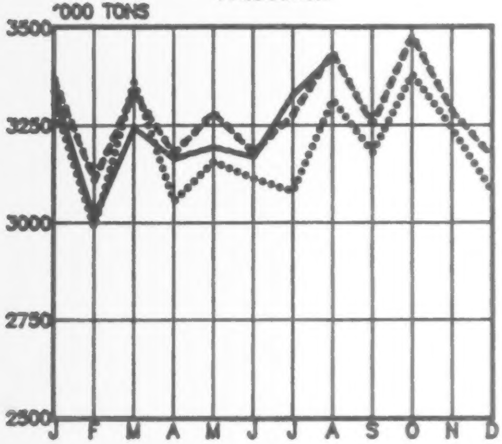
MARKET WOOD PULP

PRODUCTION



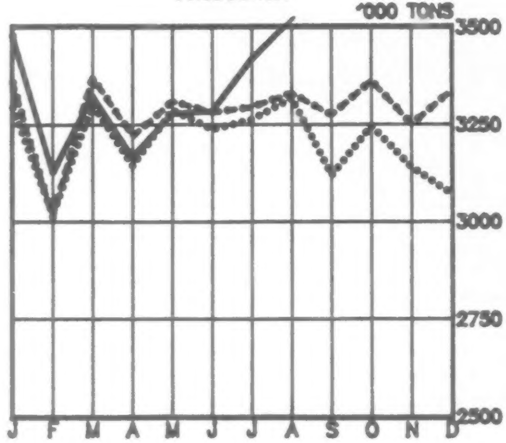
TOTAL PAPER

PRODUCTION



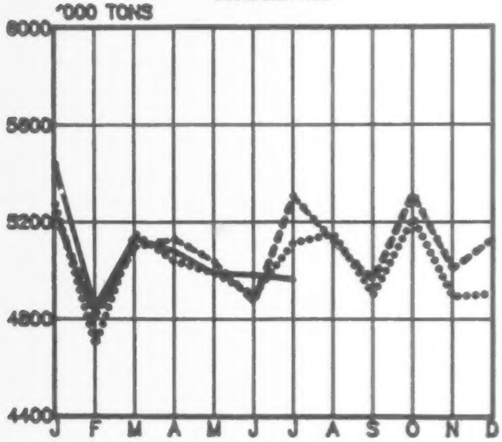
TOTAL PAPERBOARD

PRODUCTION



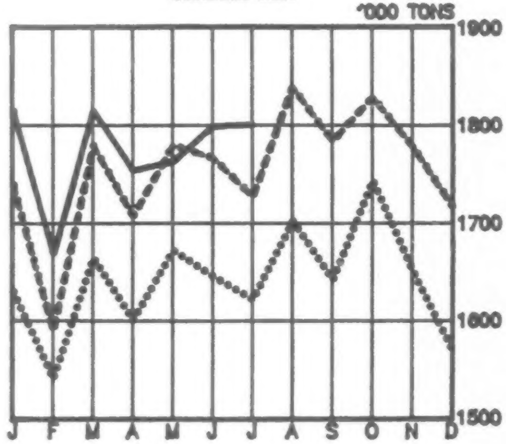
TOTAL WOOD PULP

CONSUMPTION



TOTAL WASTE PAPER

CONSUMPTION



1989 .... 1990 ------ 1991 ——

WOOD PULP STATISTICS (Thousands of Tons)			YEAR		APR	MAY	JUN (R)	JUL (P)	Annual Rate Y-T-D	% Change From Same Period Last Year
			1989	1990	1991	1991	1991	1991	1991	
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,998	63,068	5,285	5,188	5,197	5,631	63,826	1.8
	Imports	A	5,005	4,893	415	382	414	422	4,948	-2.0
	Exports	#	5,766	5,905	528	576	573	497	6,402	9.2
	New Supply		61,237	62,056	5,172	4,995	5,038	5,556	62,372	0.7
Dissolving Pulp	Production		1,425	1,293	115	92	124	130	1,378	6.1
	Imports		284	222	18	16	17	18	179	21.7
	Exports	#	798	782	50	71	84	68	788	0.4
	New Supply		912	733	83	37	57	80	769	3.6
Paper Grades	Production		50,181	51,192	4,270	4,232	4,222	4,609	51,893	1.9
Chemical Pulp	Imports	A	4,370	4,326	370	330	368	377	4,425	-0.8
	Exports	#	4,913	5,080	475	498	482	425	5,563	10.7
	New Supply		49,639	50,438	4,164	4,065	4,109	4,560	50,755	0.8
Groundwood and	Production		6,029	6,363	555	528	520	545	6,447	3.3
Thermo-Mech	Imports	A	351	345	27	35	28	27	344	-5.0
	Exports	#	55	44	3	6	7	4	51	-0.6
	New Supply		6,324	6,665	579	558	541	568	6,740	2.9
Semi-Chemical	Production		4,363	4,219	346	335	331	347	4,109	-3.9
	Imports									
	Exports									
	New Supply		4,363	4,219	346	335	331	347	4,109	-3.9
MARKET WOOD PULP										
Total Market	Production		8,664	8,798	783	710	745	793	9,076	3.5
Wood Pulp	Imports		3,539	3,215	283	235	242	272	3,069	-7.2
	Exports		5,309	5,561	479	490	548	483	5,955	10.9
	New Supply		6,893	6,451	587	455	439	583	6,191	-7.7
Dissolving Pulp	Production		1,422	1,292	115	92	124	129	1,375	6.0
	Imports		210	170	18	16	18	18	167	-0.8
	Exports		821	782	51	78	89	62	813	3.7
	New Supply		810	679	82	30	53	85	729	7.0
Paper Grades	Production		7,242	7,506	669	618	621	663	7,701	3.0
Chemical Pulp	Imports		3,072	2,813	246	200	208	234	2,682	-7.4
	Exports		4,489	4,779	428	413	459	421	5,142	12.1
	New Supply		5,825	5,540	487	405	371	476	5,241	-9.4
Groundwood Pulp	Production		0	0	0	0	0	0	0	N.M.
and All Other	Imports		258	232	19	20	15	21	221	-10.2
	Exports		0	0	0	0	0	0	0	N.M.
	New Supply		258	232	19	20	15	21	221	-10.2

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports – Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports – Department of Commerce.

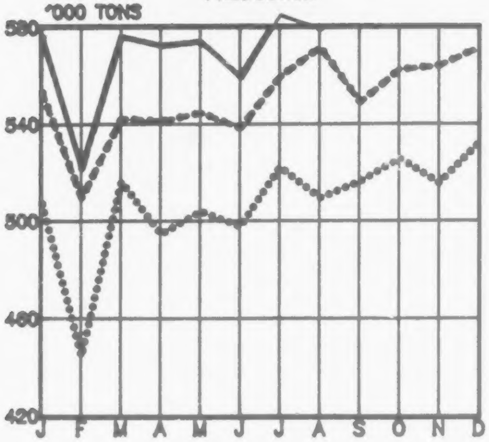
NOTE: A – API shifted Import data from January 1989 to December 1988 to compensate for misallocation of reported data. N.M. – Not Meaningful. # – 1989 Exports revised by API.

FIBROUS RAW MATERIALS (Thousands of tons)	YEAR		APR	MAY	JUN (R)	JUL (P)	Annual Rate	% Change From Same Period Last Year
	1989	1990	1991	1991	1991	1991	1991	
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,742	82,072	6,834	6,751	6,781	7,165	82,707	1.4
Total Wood Pulp	60,252	61,032	5,080	4,988	4,982	5,363	61,420	0.9
Waste Paper	19,490	21,040	1,754	1,763	1,799	1,801	21,287	2.7
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	193	226	198	210	214	218	218	4.4
Producers' Market Inventories	342	476	521	532	515	596	596	12.9
Consumers' Purchased Inventories #	519	392	394	389	351	353	353	-18.4
Waste Paper at Paper & Bd. Mills	1,082	909	960	1,025	1,001	1,024	1,024	-1.2
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp	19	23	24	25	25	30	30	15.4

SOURCES: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, API. Wood Pulp Consumption, 1989: Bureau of the Census.
Waste Paper Data: Paper Recycling Committee, API. # Includes all grades of wood pulp
P – Preliminary; R – Revised; 0 – Indicates zero to five-hundred short tons

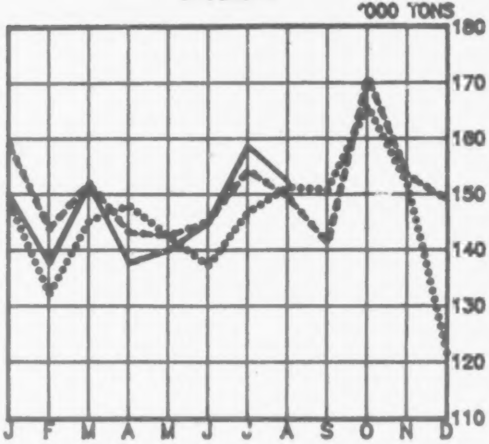
NEWSPRINT

PRODUCTION



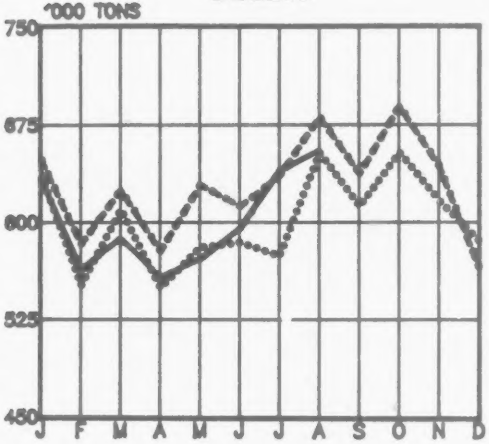
GROUNDWOOD PAPER, UNCOATED

SHIPMENTS



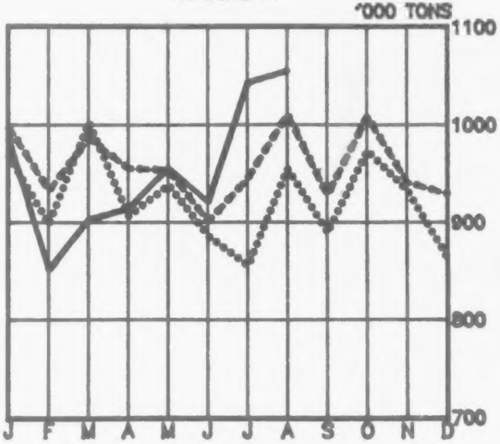
COATED PAPER

SHIPMENTS



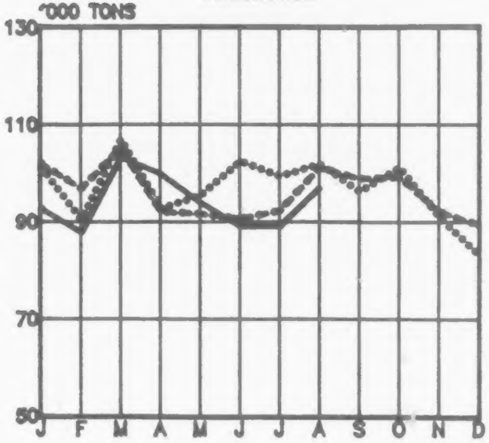
UNCOATED FREE SHEET PAPERS

SHIPMENTS



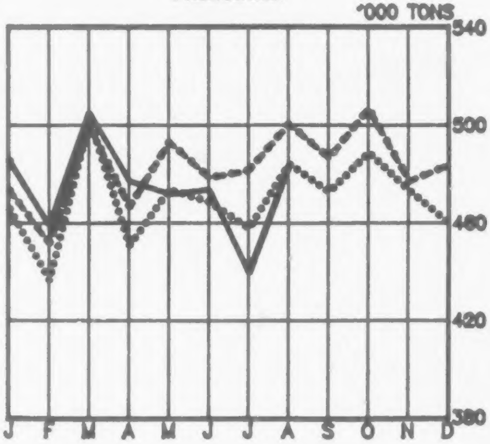
BLEACHED BRISTOLS

PRODUCTION



TISSUE PAPER

PRODUCTION



1989 •••••••• 1990 ▬ ▬ ▬ 1991 ———

FIBROUS RAW MATERIALS Thousands of Standard (128 Cu. ft.) Cords	YEAR 1989	 1990	APRIL 1991	MAY 1991	JUNE 1991	JULY 1991	ANNUAL RATE Y-T-D 1991	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,279	99,304	8,097	7,934	8,120	8,386	98,823	–0.2
– Total Consumption	98,414	99,109	8,271	8,108	7,992	8,239	98,892	–0.3
– Residues *	34,539	35,727	2,937	2,858	2,823	2,881	34,459	–3.5
– Inventories	5,462	5,961	5,082	4,936	4,880	4,948	4,948	–3.1
So. Atlantic – Total Receipts	31,982	32,536	2,658	2,477	2,536	2,692	31,378	–4.2
– Total Consumption	32,239	32,412	2,697	2,586	2,577	2,769	32,223	–1.0
– Residues *	9,961	11,181	876	803	835	889	10,467	–5.9
– Inventories	936	1,334	1,183	1,117	1,076	1,025	1,025	–5.9
Northeast – Total Receipts	7,242	7,264	578	533	584	602	7,335	2.1
– Total Consumption	7,072	7,080	582	561	555	549	6,907	–4.9
– Residues *	1,575	1,505	139	129	133	137	1,661	11.4
– Inventories	522	449	465	395	359	351	351	–5.4
South Central – Total Receipts	35,840	37,246	3,135	3,140	3,222	3,279	38,527	5.4
– Total Consumption	35,791	36,784	3,109	3,208	3,153	3,145	38,182	5.1
– Residues *	10,539	11,516	1,019	1,021	978	959	11,866	3.6
– Inventories	1,336	1,879	1,432	1,233	1,187	1,203	1,203	–1.9
North Central – Total Receipts	7,020	7,074	464	548	581	596	7,239	2.7
– Total Consumption	6,963	7,129	642	628	598	601	7,402	3.5
– Residues *	1,422	1,308	105	111	98	102	1,217	–7.6
– Inventories	938	1,014	1,029	942	920	992	992	11.6
West – Total Receipts	17,196	15,184	1,282	1,236	1,197	1,214	14,343	–7.4
– Total Consumption	16,349	15,704	1,241	1,125	1,109	1,175	14,177	–11.2
– Residues *	11,042	10,217	798	794	779	794	9,249	–10.3
– Inventories	1,730	1,285	973	1,249	1,338	1,377	1,377	–10.1

SOURCE: American Pulpwood Association

* – Consumption of Residues in cords equivalent

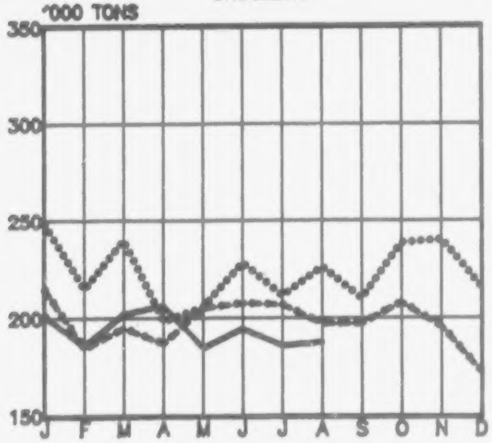
UNITED STATES TRADE WITH CANADA	IMPORTS FROM CANADA YEAR 1990 Tons	 ($000)	 JUNE 1991 Tons	 ($000)	 JULY 1991 Tons	 ($000)	ANNUAL RATE Y-T-D 1991 Tons	% CHANGE FROM SAME PD LAST YEAR
Pulpwood, Roundwood (in cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood chips	709,197	22,413	56,764	2,228	52,849	2,136	697,346	–2.5
Wood Pulp, Total	4,322,418	2,514,301	365,416	160,094	351,525	145,293	4,279,354	–4.7
Waste Fibrous Materials, Total	130,452	31,442	10,021	1,919	8,900	1,708	129,172	–9.3
Paper, Board & Products, Total	11,191,700	6,317,590	869,511	505,164	855,576	493,031	10,553,033	–7.7
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	11,047,032	5,968,425	856,665	472,241	841,251	456,530	10,402,607	–7.8
Paper, Paperboard & Products	11,066,239	6,284,416	861,268	502,927	847,553	490,851	10,476,171	–7.4
Paper & Paperboard, Only	10,921,571	5,935,250	848,421	470,004	833,228	454,350	10,325,745	–7.5
Paper, Total	10,385,505	5,723,101	796,179	449,165	771,704	430,980	9,753,375	–8.6
Newsprint	8,118,161	4,162,493	603,162	321,146	580,224	307,405	7,556,923	–10.6
Printing, Writing & Rel. Pap.	1,914,083	1,295,073	166,785	108,503	164,440	102,424	1,888,893	0.7
Pack. & Ind. Conv. Paper	211,903	121,069	15,824	9,447	19,263	11,570	208,417	0.2
Special Industrial Paper	57,441	88,444	3,566	5,376	4,039	5,968	42,565	–31.5
Tissue Paper	83,917	76,023	4,842	4,390	3,738	3,612	56,577	–28.0
Paperboard, Total	536,067	212,149	52,243	20,839	61,524	23,370	572,371	16.3
Convtd Paper&Paperbd Products	144,668	349,166	12,846	32,923	14,325	36,501	150,426	–0.3
Wet Machine Board	884	757	27	26	89	82	705	–23.3
Construction Paper & Board	124,576	32,418	8,217	2,211	7,934	2,098	78,156	–32.7

	EXPORTS TO CANADA							
Pulpwood, Roundwood (in cubic meters)	1,038,727	36,801	146,497	4,856	188,981	5,941	1,946,364	210.1
Pulpwood chips	193,841	9,066	28,094	1,321	19,809	1,008	258,339	48.2
Wood Pulp, Total	328,456	165,508	22,189	11,302	16,703	8,638	287,240	–29.2
Cotton Pulp & Other Pulp	4,373	4,284	389	324	295	259	4,558	–4.3
Waste Paper	653,204	116,346	47,470	8,213	54,157	8,302	592,873	–9.9
Paper, Board & Products, Total	1,194,633	1,317,384	120,951	127,931	122,734	127,617	1,396,642	17.0
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	893,102	820,279	89,330	79,670	92,154	79,036	1,049,249	17.3
Paper, Paperboard & Products	1,192,443	1,315,696	120,064	127,348	121,892	127,189	1,389,764	16.7
Paper & Paperboard, Only	890,912	818,590	88,443	79,086	91,312	78,607	1,042,371	16.8
Paper, Total	521,586	595,952	53,296	57,586	54,149	57,169	643,985	25.5
Newsprint	20,813	11,389	3,079	1,758	1,994	1,156	30,049	60.6
Printing, Writing & Rel. Pap.	372,852	424,207	37,051	39,943	39,394	41,438	454,949	21.3
Pack. & Ind. Conv. Paper	52,367	36,760	4,975	3,770	5,617	3,914	63,139	26.8
Special Industrial Paper	59,301	106,279	5,522	9,501	4,633	8,229	60,677	6.3
Tissue Paper	16,253	17,297	2,670	2,614	2,511	2,433	34,971	165.8
Paperboard, Total	369,326	222,638	35,147	21,500	37,163	21,436	396,385	5.0
Convtd Paper&Paperbd Products	301,531	497,106	31,621	46,261	30,580	46,582	347,393	16.3
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	2,190	1,669	887	584	842	428	6,878	221.4

SOURCE: Bureau of Census, Department of Commerce

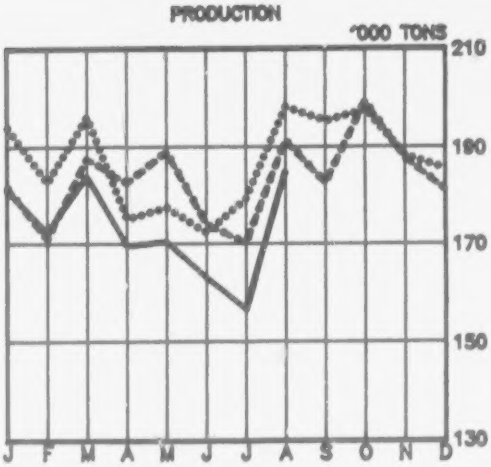
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER

SHIPMENTS



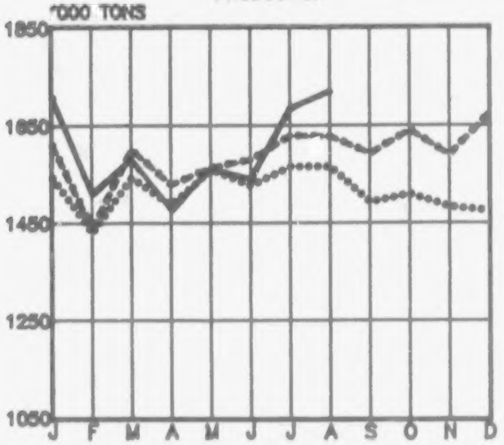
OTHER PAPER

PRODUCTION



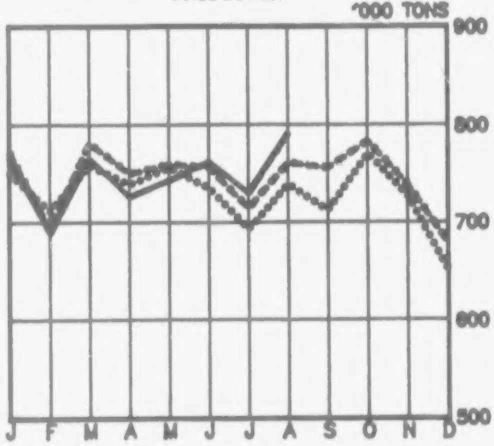
UNBLEACHED KRAFT LINERBOARD

PRODUCTION



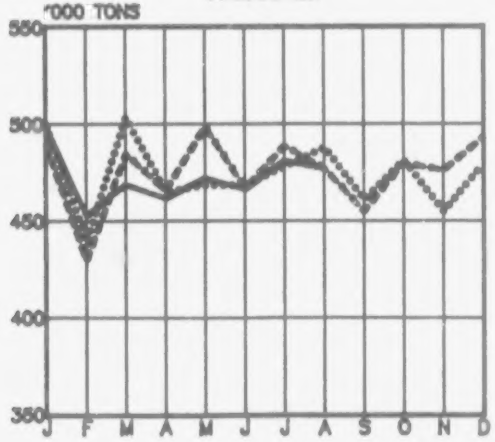
RECYCLED PAPERBOARD

PRODUCTION



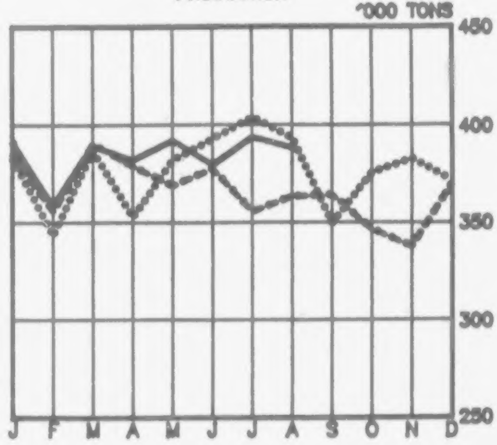
SEMICHEMICAL PAPERBOARD

PRODUCTION



SOLID BLEACHED PAPERBOARD

PRODUCTION



1989 ········ 1990 ━ ━ ━ ━ 1991 ━━━━━

PULP, PAPER AND PAPERBOARD IMPORTS	YEAR 1990		JUNE 1991		JULY 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood Roundwood (cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood Chips	710,415	22,550	58,764	2,228	52,851	2,143	697,824	-2.6
Total All Imports	18,177,409	11,292,256	1,400,845	826,960	1,392,263	812,664	17,218,754	-7.2
Wood Pulp Total	4,893,356	2,831,327	413,610	181,746	422,076	175,723	4,947,996	-2.0
Waste Paper	122,539	20,349	10,027	1,905	8,909	1,711	131,167	-1.5
Other Fibrous Materials	14,037	9,286	809	850	799	784	8,802	-43.3
Paper Board & Products Total	13,147,479	8,425,293	976,400	642,480	960,479	634,646	12,130,989	-9.2
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	12,728,760	7,425,583	944,884	567,153	925,215	539,844	11,735,275	-9.3
Paper Ppbd & Prds ex Cnst&WMB	13,006,238	8,382,641	967,216	639,528	950,845	631,364	12,042,646	-9.0
Paper & Paperboard Only	12,587,519	7,382,931	935,701	564,101	915,581	536,562	11,646,932	-9.1
Paper Total	11,961,306	7,077,036	876,350	520,668	848,520	507,999	10,998,996	-10.0
Newsprint	8,299,557	4,247,131	611,709	325,027	585,462	309,531	7,677,428	-11.3
Printing & Writing	3,104,863	2,248,424	228,937	161,101	217,064	149,971	2,844,001	-8.0
Uncoated Groundwood	1,337,581	843,550	101,811	64,809	96,274	60,344	1,301,613	0.2
Coated Print.& Impreg. Pap.	936,046	749,082	65,815	52,286	56,235	45,129	820,523	-13.9
Uncoated Free Sheet	752,448	564,479	53,102	34,424	56,654	35,299	630,036	-9.2
Thin (except Cigarette)	11,366	14,296	731	918	1,369	1,527	14,695	41.6
Bristols	67,424	77,017	7,479	8,064	6,533	7,673	76,932	13.6
Total Pkg & Other Paper	425,697	462,237	30,072	35,493	41,169	43,960	399,471	-7.1
Unbleached Kraft Paper	235,352	116,655	16,449	8,084	24,089	11,362	228,663	-2.3
Other Pkg. & Indust. Paper	190,345	345,582	[illegible]	27,409	17,079	32,597	170,808	-12.9
Tissue	131,169	119,244	[illegible]	5,067	4,825	4,537	78,096	-34.4
Paperboard, Total	626,213	305,895	[illegible]	27,503	67,061	28,564	647,933	10.0
Test or Containerboard	113,629	46,929	11,276	4,234	12,955	4,617	106,187	-16.7
Semi-Chemical Corrugating	111,935	31,152	6,197	1,435	7,279	1,744	70,833	-33.4
Other Paperboard	400,649	227,160	41,878	21,833	46,827	22,202	470,914	32.5
Convtd Paper&Paperbd Products	418,719	999,710	31,516	85,337	35,264	94,802	396,716	-6.5
Paper Products, Total	313,106	807,967	23,667	69,068	25,616	75,528	295,928	-7.5
Paperboard Products, Total	105,613	191,744	7,849	16,249	9,648	19,273	99,787	-3.5
Wet machine Board	1,132	991	45	48	63	88	898	-24.8
Construction Paper & Board E	140,110	41,661	9,139	2,914	9,542	3,194	87,447	-31.0
Notes								
Other: No Weight Avail. ($000)		136,809		12,727		13,979	126,504	-0.6
Total Imports Incl. Other($000)		11,429,064		839,717		826,642	10,433,661	-10.2

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1990		JUNE 1991		JULY 1991		Annual Rate YTD 1991	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	
Pulpwood, Roundwood (cubic meters)	1,122,468	39,971	151,352	4,924	169,734	5,861	1,977,849	170.4
Pulpwood Chips	4,637,669	412,018	406,452	35,599	463,795	45,834	5,171,961	19.1
Total All Exports	19,342,224	9,076,342	1,829,994	846,959	1,664,799	758,656	21,388,896	11.7
Wood Pulp,Total	5,905,339	3,156,671	572,546	262,907	496,870	219,094	6,401,575	9.2
Cotton Pulp and Other Pulp	135,632	104,806	6,464	6,245	5,873	4,569	99,795	-29.4
Waste and Old Paper	6,504,865	779,687	515,923	59,937	500,483	52,892	6,661,377	4.8
Paper, Board & Products,Total	6,796,384	5,035,177	735,062	517,871	661,574	482,101	8,226,149	21.1
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,748,620	3,449,743	625,448	353,618	564,839	323,470	6,946,505	20.4
Paper, Ppbd & Prod ex Cnst&WMB	6,786,518	5,028,683	733,008	516,544	659,527	481,097	8,203,463	20.9
Paper & Paperboard, Only	5,738,760	3,443,249	623,392	352,292	552,793	322,466	6,923,819	20.2
Paper, Total	1,519,062	1,455,104	184,206	161,210	164,806	142,075	1,947,192	32.3
Newsprint	535,993	293,182	64,594	33,143	47,670	23,308	635,152	26.1
Printing & Writing	664,824	717,700	85,354	77,894	84,960	79,048	919,661	38.6
Uncoated Groundwood	75,299	83,574	15,228	9,615	9,760	7,032	[illegible]	73.2
Clay Coated Paper	218,684	215,289	22,575	19,858	27,100	23,357	299,107	25.2
Uncoated Free Sheet	232,369	306,127	28,432	33,747	34,196	34,914	350,467	50.1
Other Printing & Writing	138,472	132,709	19,119	14,474	13,924	13,746	176,518	22.0
Total Pkg. & Other Paper	233,584	403,949	29,547	35,404	28,151	35,295	334,369	22.1
Unbleached Kraft	112,828	60,480	12,292	6,261	10,693	5,569	135,121	21.9
Other Pkg. & Indust. Paper	170,756	343,469	17,255	29,143	17,458	29,727	199,248	22.2
Tissue	34,651	40,273	4,712	4,969	4,007	4,423	57,969	67.5
Paperboard, Total	4,219,698	1,988,144	439,186	201,082	387,985	180,391	4,976,627	18.1
Solid Wood Pulp	3,993,101	1,867,502	420,270	188,446	367,196	168,255	4,750,584	17.7
Total Linerboard	2,924,140	1,076,705	298,867	104,123	257,527	90,236	3,420,196	16.3
Bleached Kraft Linerboard	335,444	150,819	28,445	12,240	33,304	13,231	382,752	37.3
Unbleached Kraft Linerbd	2,588,697	925,886	270,423	91,883	224,223	77,005	3,037,444	13.0
Other Unbleached Kraft	253,945	144,169	35,607	20,169	27,632	15,742	394,327	47.4
Other Bleached Kraft	764,550	628,859	78,005	61,758	73,234	59,701	865,114	12.9
Semi-Chemical Corrugating	50,466	17,769	7,791	2,398	8,803	2,576	80,947	76.3
Recycled Paperboard	226,598	120,643	18,916	12,636	20,790	12,136	226,043	-0.3
Convtd Paper&Paperbd Products	1,047,768	1,585,435	109,614	164,252	108,735	158,631	1,279,644	24.8
Paper Products, Total	440,793	1,012,642	52,712	112,195	48,361	103,903	578,258	37.9
Paperboard Products, Total	606,975	572,793	56,901	52,057	58,373	54,728	701,386	15.4
Wet Machine Board	487	232	52	20	24	12	380	-42.7
Construction Paper & Board E	9,384	6,262	2,004	1,307	2,022	882	22,326	172.0
Notes								
Other: No Weight Avail. ($000)		49,964		5,441		6,095	61,934	28.2
Total Exports Incl. Other($000)		9,125,306		852,400		764,750	9,871,968	7.8

SOURCE: Bureau of Census, U.S. Department of Commerce. E – Incl. estim. of tonnage based on square foot data.

(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR		MAY	JUNE	JULY	AUGUST	Annual Rate Y-T-D	% Change from same Period
	1989	1990	1991	1991	1991	1991	1991	Last Year
Pulp, Paper and Products except Building Grades	132.4	132.9	129.9	129.0	128.8	128.7	130.5	-1.9
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	132.0	132.8	129.9	129.1	129.1	129.0	130.6	-1.7
Total Wood Pulp	157.4	151.2	122.5	118.1	117.2	115.5	123.9	-20.1
Total Paper	129.6	128.8	127.1	125.9	125.8	125.7	127.9	-0.3
Writing Paper, exc. Newsprint	130.5	129.1	124.8	123.0	123.0	123.1	126.0	-1.9
Newsprint	122.5	119.6	122.1	119.7	119.0	118.5	122.8	3.9
Total Paperboard	140.1	135.7	127.0	126.7	127.4	127.9	129.0	-5.7
Total Paper and Paperboard *	132.9	131.0	127.1	126.2	126.3	126.4	128.2	-2.1
Converted Products	131.7	135.1	135.2	134.9	134.7	134.7	135.5	0.4
Waste Paper	157.1	138.9	128.8	121.0	113.2	112.4	126.0	-11.4
All Commodities	112.2	116.3	116.5	116.3	116.0	116.2	116.7	1.7
Industrial Commodities	111.6	115.8	116.1	116.0	116.0	116.4	116.5	2.5

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

PAPER AND ALLIED PRODUCTS INDUSTRY
SALES, EARNINGS AND BALANCE SHEET DATA
1984 - 1991
(Millions of Dollars)

	Net Sales	Net Profit Before Taxes	Net Profit Before Taxes to Net Sales (%)	Taxes	Net Profit After Taxes	Net Profit After Taxes to Net Sales (%)	Stock-holders Equity	Return on Equity (%)	Long-term Debt	Total Assets
1984	71,891	4,812	6.7	1,796	3,015	4.2	28,160	10.7	13,802	58,520
1985 C	71,761	4,424	6.2	1,533	2,891	4.0	29,780	9.7	15,262	62,613
1985 R	71,465	4,399	6.2	1,519	2,880	4.0	29,694	9.7	15,262	62,505
1986 C	74,896	5,318	7.1	2,025	3,293	4.4	31,254	10.5	18,920	69,132
1986 R	74,844	5,298	7.1	2,018	3,280	4.4	31,221	10.5	18,906	69,082
1987 C	86,603	8,077	9.3	3,088	4,989	5.8	35,162	14.2	20,152	76,791
1987 R	95,576	8,860	9.3	3,336	5,520	5.8	39,217	14.1	22,417	85,279
1988 C	107,014	12,204	11.4	4,127	8,077	7.5	42,933	18.8	27,067	95,295
1988 R	107,221	12,210	11.4	4,129	8,081	7.5	42,940	18.8	27,180	95,444
1989 C	112,238	10,771	9.6	3,771	7,000	6.2	45,888	15.3	33,193	107,572
1989 R										
First Quarter	110,376	12,172	11.0	4,184	7,992	7.2	43,811	18.2	29,016	98,562
Second Quarter	115,448	14,412	12.5	4,344	8,068	7.0	44,954	17.9	31,248	102,895
Third Quarter	113,824	11,876	10.4	4,388	7,488	6.6	46,246	16.2	32,909	105,834
Fourth Quarter	114,644	7,000	6.1	2,360	4,640	4.0	45,642	10.2	34,543	109,038
Total	113,573	11,365	10.0	3,819	7,047	6.2	45,642	15.4	34,543	109,038
1990 C	114,686	7,187	6.3	2,343	4,844	4.2	46,462	10.4	39,961	116,812
1990 R										
First Quarter	115,176	8,784	7.6	2,968	5,816	5.0	47,950	12.1	37,970	115,368
Second Quarter	116,072	9,268	8.0	2,868	6,400	5.5	44,977	14.2	38,777	111,721
Third Quarter	116,148	7,524	6.5	2,668	4,856	4.2	45,601	10.6	39,291	114,134
Fourth Quarter	114,696	3,368	2.9	908	2,456	2.1	45,951	5.3	40,720	117,335
Total	115,523	7,238	6.3	2,353	4,882	4.2	45,951	10.6	40,720	117,335
1991 C										
First Quarter	109,536	5,096	4.7	1,624	3,464	3.2	46,714	7.4	42,377	118,212
Second Quarter	111,448	4,760	4.3	1,596	3,168	2.8	46,398	6.8	42,809	118,204
Total	110,492	4,928	4.5	1,610	3,316	3.0	46,398	7.1	42,809	118,204

NOTE: Quarterly data are at annual rates. C=Consistent with the previous year's final total.
R=Revised to reflect changes in the number of companies classified to this industry.

SOURCE: Quarterly Financial Report for Manufacturing, Mining, and Trade Corporations - Bureau of the Census, U.S. Department of Commerce.

reprographic departments, business form converters and exports. Some of the increase may reflect user anticipation of stronger demand.

Coated paper shipments trailed last year's total by 3.8% in the January-August 1991 period. On a seasonally adjusted basis, shipments ebbed from September 1990 to May 1991, but then rebounded. The June-August 1991 rate was 7.6% above that of the previous three-month period and 2.3% below their June-August 1990 rate.

Shipments of unbleached kraft papers were off 3.2% for the first eight months of 1991. When net imports and consumption of bags made from recovered papers are included, the total new supply was down by only 1.4%.

Total output of specialty packaging and special industrial papers is running close to year-ago levels. The reported individual grade totals for 1991 and 1990 are presently under review, and the data shown in the table on page 3 for 1990 and 1991 are not directly comparable with each other.

Paperboard: Paperboard production was 1.6% above its comparable eight month 1990 level, reflecting a 2.0% rise in containerboard combined with a 0.6% increase in boxboard. Production of paperboard for export was up 14.6%, accounting for 87% of the total gain in production.

Within the domestic market, production of linerboard for use in fibre boxes showed a year-to-year increase of 0.7%. This comparison has improved of late -- the rate of production in the July-August period was 5.4% above that of first-half 1991. Production of corrugating medium reported a 0.5% decline.

The 0.6% gain reported for total boxboard was the resultant of a 10.1% rise in folding boxboard, largely offset by weakness in the set-up and "other paperboard" grades. As the table on page 3 shows, production of folding boxboard for domestic use was 9.2% above its year-earlier total. The impact of the new unbleached kraft folding boxboard machine appears in both the domestic use component -- with a 24.5% rise -- and in production for export -- up 38.1%. Solid bleached and recycled folding boxboard also recorded strong increases.

The weakness in the non-packaging grades was concentrated in gypsum wallboard facing, which is largely dependent on housing construction. Production of tube, can and drum stock, which is included the "other boxboard" grades, was fairly close to its year-ago level.

FIBROUS RAW MATERIALS

Production of chemical paper grade market pulp continued along its flat trend in August, with the January-August total 1.8% ahead of its year-ago rate. For six of these months, however, production ran ahead of shipments, bringing inventories from 26 days of supply at the end of January to 30 days at the end of August.

The relative stability in total shipments continues to reflect rising export demand, compensating for weakness in the domestic market: export shipments gained 8.7%, those to the domestic market fell 8.8%. Shipments to Western Europe, Japan and the other Asian/African countries each increased by 11-12%, with the total accounting for 87% of all exports of these grades.

The domestic industry's use of wood pulp as a fibrous raw material appears to be affected by increases in recovered paper. In the January-July period, use of recovered paper was 2.7% over its comparable 1990 total, compared to a 0.9% increase in wood pulp.

COMPARATIVE LABOR COMPENSATION AND PRODUCTIVITY TRENDS

The U.S. paper industry's competitive position in world markets is influenced by several cost-related factors, including comparative levels of labor compensation and productivity. The U.S. Bureau of Labor Statistics (BLS) regularly compiles data on hourly compensation of paper industry production workers in several key nations. The BLS has recently made available the 1989 data, reported in both national currencies and U.S. dollars.

Hourly compensation of U.S. paper and allied product production workers increased at an average annual rate of 5.5% a year between 1979 and 1989, rising from $9.64 to $16.45. The rates of increase averaged 7.6% a year from 1979 to 1985 and 2.4% a year from 1985 to 1989.

Canada and Sweden, like the U.S., are both major exporters of pulp and paper products. Hourly compensation of Canadian paper industry production workers, measured in U.S. dollars, rose from 94% of the U.S. compensation level in 1985 to 110% of the U.S. level in 1988 and 117% of the U.S. level in 1989. The increase in relative compensation of Canadian workers reflected two factors: (1) compensation of Canadian paper industry production workers, measured in Canadian dollars, rose at an average annual rate of 4.3% a year from 1985 to 1989, and (2) the Canadian dollar strengthened against U.S. currency during this period, causing compensation of Canadian paper industry production workers to increase even faster on a U.S. dollar basis. Compensation of U.S. workers, measured in U.S. dollars, rose 2.4% a year.

Hourly compensation of Swedish paper industry production workers rose from 73% of the U.S. level in 1985 to 120% in 1988 and 122% in 1989. Measured in krona, hourly compensation of Swedish paper industry production workers advanced at an average rate of 8.4% a year from 1985 to 1989. However, because the krona appreciated relative to the dollar during most of that period, the U.S. dollar value of hourly compensation paid to Swedish paper industry production workers rose an average of 16.4% a year from 1985 to 1989.

The U.S. paper industry's hourly compensation rates are typically above those rates paid by Asian paper industries. For instance, compensation in Japan amounted to 87% of the U.S. level in 1989, up from 46% in 1985. Korean and Taiwanese paper industry production workers received compensation amounting to just 23% of the U.S. level in 1989. Paper industry production workers in the former West Germany and France earned hourly compensation that was about on par with U.S. levels in 1989 (see tables below).

Relative U.S. Dollar Compensation of Paper Industry Production Workers
(United States = 100)

	1979	1985	1988	1989
U.S.	100	100	100	100
Canada	100	94	110	117
Sweden	130	73	120	122
Japan	60	46	85	87
Korea	15	10	17	23
Taiwan	10	12	20	23
France	88	53	87	82
Germany	109	58	104	97
U.K.	62	45	72	68

Source: U.S. Bureau of Labor Statistics

Output per manhour and unit labor costs are also important measures of a country's competitiveness. Although the BLS does not compile such data for a cross section of countries at the detailed level of the paper industry, it does do so at the "all manufacturing" level. A detailed listing and discussion of these data through 1989 can be found in the April 1991 issue of the API Monthly Statistical Summary. Portions of the data are updated through 1990 in the following table.

Output per manhour in the U.S. manufacturing sector trended up 3.1% a year from 1979 to 1990. That was about average for the nations listed in the preceding text table, with the United Kingdom (4.4% a year) and Japan (4.1%) at the high end of the range and Canada (1.4%) at the low end of the range.

Unit labor costs, which are influenced by output per manhour and compensation, as well as exchange rates if international comparisons are to be made, are a useful summary measure of a nation's competitiveness. From 1979 to 1990, unit labor costs in the U.S. manufacturing sector increased at an average annual rate of 2.1% a year. That was the lowest rate of increase in dollar-denominated unit labor costs for any of the countries listed in the following tables.

Output Per Manhour/Unit Labor Costs in Manufacturing
(average annual % change)

	Output Per Manhour			Unit Labor Costs in U.S. Dollars		
	1979-90	1989	1990	1979-90	1989	1990
U.S.	3.1%	0.9%	2.5%	2.1%	3.0%	0.7%
Canada	1.4	0.7	2.7	5.4	9.7	5.7
Sweden	2.0	0.3	0.5	3.6	3.4	18.4
Norway	2.4	3.7	2.3	4.5	-5.2	14.4
Japan	4.1	5.2	3.7	4.1	-6.4	-3.5
Korea	N.A.	N.A.	N.A.	3.9	26.0	-1.0
Taiwan	N.A.	N.A.	N.A.	8.0	13.3	2.4
France	3.2	4.8	1.1	2.9	-7.2	20.5
Germany	2.0	4.3	3.4	4.5	-6.4	19.1
U.K.	4.4	4.8	0.8	3.3	-4.8	18.6

Source: U.S. Bureau of Labor Statistics
N.A. - Not Available

Changes in Hourly Compensation of Paper Industry Production Workers
(average annual % change)

	In Dollars			In National Currency		
	1979-89	1979-85	1985-89	1979-89	1979-85	1985-89
U.S.	5.5%	7.6%	2.4%	5.5%	7.6%	2.4%
Canada	7.1	6.5	8.1	7.2	9.3	4.3
Sweden	4.8	-2.2	16.4	9.2	9.8	8.4
Japan	9.4	3.0	19.8	4.5	4.5	4.5
Korea	10.4	0.2	27.7	14.1	10.5	19.7
Taiwan	14.6	10.4	21.2	11.2	12.2	9.6
France	4.8	-1.2	14.4	9.1	11.9	5.1
Germany	4.3	-3.0	16.4	4.6	4.9	4.1
U.K.	6.5	2.0	13.7	9.3	10.8	7.2

Source: U.S. Bureau of Labor Statistics

MONTHLY STATISTICAL SUMMARY INSERT
VOL. 69, NO. 9
SEPTEMBER, 1991

PRODUCTION (000 TONS)

	(P) AUGUST 1991	(R) JULY 1991	AUGUST 1990	FIRST 8 MONTHS 1991	FIRST 8 MONTHS 1990	% CHANGE YR TO DATE 1991/1990
PAPER GRADES						
Newsprint	580	586	572	4,546	4,362	4.2
Printing & Writing	1,991	1,960	1,976	14,600	14,913	-2.1
Uncoated Groundwood (s)	152	159	150	1,174	1,191	-1.4
Coated Groundwood (s)	359	350	378	2,685	2,783	-3.5
Coated Free Sheet (s)	297	290	304	2,124	2,215	-4.1
Total Coated Paper (s)	656	640	682	4,809	4,998	-3.8
Uncoated Free Sheet Paper (s)	1,057	1,044	1,012	7,637	7,692	-0.7
Thin Paper (s)	17	17	19	130	153	-15.2
Cotton Fiber Paper (s)	12	10	13	98	107	-8.4
Bleached Bristols (s)	97	89	101	753	772	-2.5
Tissue Paper	484	440	501	3,796	3,847	-1.3
Total Pkg & Other Paper	385	352	389	3,021	3,050	-0.9
Unbl. Kraft Paper (s)	188	186	198	1,551	1,602	-3.2
Bl. Kraft Paper (s)	39	34	38	278	320	-13.1
Specialty Pkg. Paper	54	47	51	407	364	11.6
Special Industrial Paper (s)	103	84	102	786	764	2.8
TOTAL PAPER	3,439	3,338	3,438	25,964	26,172	-0.8
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,864	1,813	1,728	13,767	13,413	2.6
Unbleached Kraft Linerboard	1,721	1,687	1,630	12,793	12,598	1.5
Other Unbl. Kraft Paperboard	143	126	98	974	815	19.5
Semichemical Paperboard	477	481	478	3,780	3,804	-0.6
Bleached Paperboard	389	394	364	3,078	2,979	3.3
Recycled Paperboard	792	731	762	5,980	5,996	-0.3
TOTAL PAPERBOARD	3,522	3,419	3,331	26,605	26,192	1.6
TOTAL PAPER AND PAPERBOARD	6,961	6,757	6,769	52,569	52,364	0.4

WOOD PULP (ALL GRADES)	JULY 1991	JUNE 1991	JULY 1990	FIRST 7 MONTHS 1991	FIRST 7 MONTHS 1990	% CHANGE 1991/1990
Dissolving & Special Alpha	130	124	107	804	757	6.1
Bleached Sulfite) Unbleached Sulfite)	155	124	130	933	924	1.0
Bleached & Semi-Bl. Sulfate	2,499	2,306	2,424	16,576	16,015	3.5
Unbleached Sulfate	1,955	1,792	1,902	12,760	12,758	0.0
Semichemical	347	331	364	2,397	2,495	-3.9
Groundwood & Thermomechanical	545	520	546	3,761	3,640	3.3
TOTAL PULP DIVISION DATA	5,631	5,197	5,474	37,230	36,589	1.8

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA September 30, 1991	1989	1990	1991	1991 R	1991 P	AN RATE Y-T-D 91	% CH/ SAME PD 90
PAPER AND PAPERBOARD -- Tons (000)			JUNE	JULY	AUGUST		
Total Production (API)................: excluding :................	76,785	78,782	6,465	6,757	6,961	78,854	0.4
Total Seasonally Adjusted..........: construction :................			6,560	6,788	6,745	78,640	0.4
Imports (including Products).......: and wet :.....E................	12,910	13,006	967	951	975	12,000	-9.2
Exports (including Products).......: machine :.....E................	6,263	6,787	733	660	700	8,228	20.3
Apparent Consumption....r..........: grades :................	83,432	85,002	6,794	7,080	7,020	82,412	-2.7
Paper Production % Tonnage Capacity................	93.0	93.2	88.4	89.1	91.2	89.3	-
Paperboard Production % Tonnage Capacity................	94.0	94.2	92.7	92.3	95.0	92.6	-
PAPER, PAPERBOARD AND PRODUCTS			MAY	JUNE	JULY		
Imports.....:Including Construction and :................	13,100	13,147	1,017	976	960	12,131	-9.2
Exports.....: WME Grades (excl. HPB) :................	6,300	6,796	700	735	662	8,226	21.1
MARKET WOOD PULP PRODUCTION - Tons (000)................	8,664	8,798	710	745	793	9,076	3.5
TOTAL WOOD PULP PRODUCTION - Tons (000).......f................	61,998	63,068	5,188	5,197	5,631	63,826	1.8
WOOD PULP IMPORTS - TONS (000)................	5,005	4,893	382	414	422	4,948	-2.0
WOOD PULP EXPORTS - TONS (000)................	5,766	5,905	576	573	497	6,402	9.2
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS....: excluding :................			MAY	JUNE	JULY		
Wood Pulp..........................: consumption for :................	60,252	61,032	4,988	4,982	5,363	61,420	0.9
Waste Paper..........................: construction & :................	19,490	21,040	1,763	1,799	1,801	21,287	2.7
TOTAL..........................: WMB grades :................	79,742	82,072	6,751	6,781	7,165	82,707	1.4
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	98,414	99,109	8,108	7,992	8,239	98,892	-0.3
EMPLOYMENT (000)			JUNE	JULY	AUGUST		
Paper and Allied Products.........Total................	697.4	699.3	694.3	693.5	697.4	691.3	-1.2
Pulp, Paper and Board Mills........Total......A................	245.6	245.2	244.8	245.0	244.4	242.7	-1.3
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			JUNE	JULY	AUGUST		
Paper and Allied Products................	11.96	12.30	12.66	12.78	12.73	12.62	3.3
Pulp, Paper Mills.................A................	14.72	15.18	15.58	15.82	15.81	15.52	3.2
Paperboard Mills.................E..................;................	14.76	15.25	15.49	15.62	15.75	15.57	3.3
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1990 Q4	1991 Q1	1991 Q2		
(Rept. by US Dept. of Com., Ann. Rates, Bill.$)*	15.58	16.53 R	14.06	13.20	11.38	11.93 Y	-27.8
INDEX OF OUTPUT PER MAN-HOUR (1982=100)			JUNE	JULY	AUGUST		
:IN PULP, PAPER :...Production Workers................	125.9	128.8	129.2	134.2	134.4	130.7	1.8
:AND BOARD MILLS:...All Employees................	126.5	129.3	130.4	135.4	135.4	131.6	2.2
PAPER AND ALLIED PRODUCTS (Million $)			JUNE	JULY	AUGUST		
Industry Shipments (Dept. of Commerce)*................	130,501	131,080	10,284	10,251	10,257	121,682	-7.1
Pulp, Paper and Paperboard*................	57,700	56,356	4,430	4,357	4,324	52,226	-6.9
Inventories (End of Period) - Total Industry*................	12,571	12,980	13,332	13,247	13,057	13,057	2.4
Pulp, Paper and Paperboard*................	4,980	5,305	5,560	5,537	5,511	5,511	6.0
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1990 Q4	1991 Q1	1991 Q2		
Sales (Corporations Only)................	113,573	115,523	28,674	27,384	27,862	110,492	-4.4
Earnings (Corporations Only)................	7,047	4,882	614	868	792	3,320	-45.6
Depreciation (Corporations Only)................	5,010	5,578	1,481	1,441	1,420	5,722	5.6
Net Worth (Corporations Only)................	45,642	45,951	45,951	46,714	46,398	46,398	3.2
PRICE INDEXES (Bureau of Labor Stats)1982=100			JUNE	JULY	AUGUST		
Pulp, Paper & Products, ex. Building Grades................	132.4	132.9	129.0	128.8	128.7	130.5	-1.9
Wood Pulp................	157.4	151.2	118.1	117.2	115.5	123.9	-20.1
Waste Paper................	157.1	138.9	121.0	113.2	112.4	126.0	-11.4
Paper................	129.6	128.8	125.9	125.8	125.7	127.9	-0.3
Paperboard................	140.1	135.7	126.7	127.4	127.9	129.0	-5.7
PAPER DEMAND (INDEXED: 1987=100)			JUNE	JULY	AUGUST		
Total Paper Production *................	103.7	106.7	105.6	111.0	108.3	105.6	-0.8
Paper New Supply *................	102.4	104.6	98.8	103.0	101.3	100.3	-4.4
Demand Indicators - (Weighted Average) *................	107.8	110.1	109.4	110.2	110.5	109.4	-0.6
Production of Nondurable Goods.........*....(21.2%)................	106.4	107.8	107.5	108.2	108.9	106.9	-0.8
Disposable Income..........................*....(23.9%)................	107.2	108.1	108.0	107.9	108.1	107.4	1.6
Total Printing and Publishing..............*....(54.9%)................	108.6	111.9	110.7	112.0	112.1	111.2	-0.4
PAPERBOARD DEMAND (INDEXED: 1987=100)			JUNE	JULY	AUGUST		
Total Paperboard Production *................	103.0	105.4	106.0	108.1	109.4	105.9	1.6
Production for Domestic Use	103.2	104.6	103.3	105.4	106.3	103.4	0.2
Demand Indicators - (Weighted Average) *................	107.2	107.9	107.4	107.8	108.2	106.3	-1.6
Production of Consumer Goods...........*....(62.06%)................	106.6	107.3	107.9	107.9	108.4	106.4	-0.8
Production of Equipment....................*....(5.75%)................	112.3	115.5	112.9	112.9	112.3	112.8	-2.1
Production of Materials......................*....(32.19%)................	107.4	107.8	105.4	106.7	107.2	104.8	-2.9
MARKET DATA			MAY	JUNE	JULY		
Newsprint Consumption by Publishers - Tons (000)................	13,493	13,368	1,052	1,011	972	12,120	-8.7
Newspaper Pub. and Printing Empl. Total(000)................	472	476	463	463	460	465	-2.3
Magazine Advertising Pages (PIB, Inc.)	181,995	176,121 R	13,148	12,644	9,539	147,529	-12.4
Wholesalers Sales and Inventories (Million $)			MAY	JUNE	JULY		
Total Paper & Pap. Prdcts.,ex Wallpaper..Sales................	50,015	51,454	3,996	3,905	4,218	48,621	-4.0
Inventories (End of Period)................	4,132	4,300	3,954	3,890	3,805	3,805	-8.6
FIBRE BOX DATA (Fibre Box Association)			JUNE	JULY	AUGUST		
Fibre Box Shipments (Million square feet)................	313,400	318,102	25,722	27,845	28,297	319,313	-1.0
Container'bd Inventory at Mill & Plant (000 Tons)................	2,589	2,765	2,637	2,706	2,604	2,604	-0.6
RETAIL TRADE (Billion $)							
Total Retail Sales *................	1,742	1,808	152.6	153.4	152.3	1,819	0.9
Nondurable Goods Stores Sales *................	1,089	1,153	98.4	99.2	99.2	1,178	3.2
GENERAL ECONOMIC DATA			JUNE	JULY	AUGUST		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*................	108.1	109.2	107.3	108.0	108.2	106.6	-2.4
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)................	112.2	116.3	116.3	116.0	116.2	116.7	1.7
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)................	124.0	130.7	136.0	136.2	136.6	135.5	4.8
GROSS NATIONAL PRODUCT - ANNUAL RATE (Billions$)			1990 Q4	1991 Q1	1991 Q2		
G.N.P. or Expenditure - Current $................	5,201	5,465	5,527	5,558	5,616	5,567	3.3
G.N.P. or Expenditure - 1982 $................	4,118	4,157	4,153	4,124	4,123	4,124	-0.7
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	671	681				655	

f - Wood Pulp Prod exc del., explo & acr. R - Revised E - Last month estimated by API A - Est. by API Y - 1st quarter est. by Dept. of Commerce * Seasonally Adjusted